

LANE EDUCATION SERVICE DISTRICT	BOARD MEETING
1200 Hwy 99 N	Tuesday, June 3, 2025
Eugene, Oregon 97402	Regular Meeting: 6:00 PM

Work Session at 5:00 pm

**LANE ESD BOARD MEETING
AGENDA
Tuesday, June 3, 2025**

1. Work Session: Board Self-Evaluation

The Board and Superintendent will discuss the Board's self-evaluation.

Superintendent Scurto, Board Chair

Board Self Evaluation 2025

14

2. Call Regular Meeting To Order

Board Chair

3. Welcome

Guests attending the meeting will be introduced.

Board Chair

4. Lane Education Service District Statement of Accountability: Land Acknowledgement

Lane ESD acknowledges that the lands we call Lane County - the lands that sustain our children, our future, and our collective well-being - are the traditional ancestral home of the Kalapuya, Siuslaw, Molalla, and other indigenous people who have lived in Lane County since time immemorial. Native children, families, and communities bear witness to a legacy of displacement and forced relocation. As an educational institutions we are accountable for addressing the current and former silencing, erasure and genocide of native people in Oregon and Turtle Island. We aim to join with indigenous people, honoring their resilience, courage, and self-determination in a purposeful pursuit of justice.

Today indigenous people -- alive, diverse, and vibrant -- live in and contribute to the culture of Lane County. We are all blessed by their presence.

Members of the Board

Lane ESD Board of Directors Land Acknowledgement

5. Public Participation

This is an opportunity for the audience to address the Board on topics either on, or not on, the agenda. There will also be opportunities for the audience to comment on specific agenda items as the Board addresses them.

Comments Regarding Staff Members - Speakers may offer objective criticism of ESD operations and programs. The Board will not hear comments regarding any individual ESD staff member. The Board chair will direct the visitor to the procedures in Board policy KL - Public Complaints for Board consideration of a complaints involving a staff member. The association contract governing the employee's rights will be followed. A commendation involving a staff member should be sent to the superintendent, who will forward it to the staff member, his/her supervisor and the Board.

The Board requests that a public comment add information or a perspective that has not already been mentioned previously, and that the patron refrains from repeating a similar point. To make a comment or present a topic during public comment, if the opportunity is available on the Board agenda, please complete the Intent to Speak card and submit it to the Board secretary prior to the start of the meeting. An individual that has submitted an Intent to Speak card and has been invited to speak by the Board chair, will be allowed three minutes.

Any person, who is invited by the Board chair to speak to the Board during a meeting, should state his/her name and address and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose.

6. Agenda Review

Board Chair

7. Public Hearing for 2025-26 Approved Budget

The Board Chair will open the public hearing, invite any public comment on the 2025-26 approved budget, and then close the hearing.

This is an opportunity for the public to address the Board on the 2025-26 budget as approved by the Lane ESD Budget Committee. To make public comment during the hearing, please complete the Intent to Speak card and submit it to the Board secretary prior to the start of the meeting. An individual that has submitted an Intent to Speak card and has been invited to speak by the Board chair, will be allowed three minutes. Any person, who is invited by the Board chair to speak during the hearing should state their name and address and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose.

Board Chair

Lane ESD 2025-2026 Proposed Budget (As Approved by the
Lane ESD Budget Committee)

24

8. Presentation--Special Education

The Special Education Department's presentation will highlight Lane School's year in review and include information on Daffodils School, JDEP and RISE, MLK updates, Life Skills and our new ISP classrooms.

Presenters: Special Education Team Pres

Superintendent Scurto

9. Action Items

Board Chair

A. Consent Agenda

The Lane ESD Board of Directors has agreed to implement a consent agenda. All items in the consent agenda are adopted by a single motion unless a member of the Board or the Superintendent requests that such item be removed from the consent agenda and acted upon separately.

Generally, consent agenda items are matters which members of the Board agree are routine in nature and should be acted upon in one motion to conserve time and to enable the Board to focus on the other matters on the agenda.

Back-up materials for consent agenda items are included in the agenda packet as needed. Minutes of this meeting will reflect action on each item.

If any board member wishes to withdraw any consent group item, it will be moved to the appropriate section of the agenda.

BE IT RESOLVED that the Board of Directors of Lane ESD adopts the consent group as submitted and listed below.

1. Human Resources Report - June 1, 2025

Board Chair

HR Board Report - June 2025

130

B. Accept Financial Report

BE IT RESOLVED that the Board of Directors of Lane ESD accepts the Financial Report for April 2025.

Board Chair

April 2025 Financial Report 132

C. Transfer of Appropriations in General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund

Oregon Revised Statute 294.463 allows the ESD to transfer appropriations within a fund when authorized by resolution of the governing body. Proposed changes are based on transferring funds from one function to another as needed in anticipation that expenditures may exceed appropriations in the General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund.

BE IT RESOLVED that the Board of Directors of Lane ESD adopts the transfer of appropriations as outlined in the attached resolution.

Board Chair

Resolution Transferring Appropriations in the General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund 136

D. Adopt 2025-26 Budget, Make Appropriations, Impose Property Taxes, and Categorize Taxes

Oregon Revised Statute 294.456 prescribes that the governing body shall enact resolutions to adopt the budget, to make the appropriations, to determine, make and declare the ad valorem property tax amount or rate to be certified to the assessor, and to itemize and categorize the ad valorem property tax amount or rate as required under ORS 310.060. The format and wording is based on recommendations from the Oregon Department of Revenue. The Board is required by law to adopt a balanced budget before July 1, 2025, the start of the new fiscal year.

The Board annually levies a permanent tax rate for general operating purposes of the school district. The tax rate for the General Fund is a permanent rate computed by the Oregon Department of Revenue expressed in dollars per thousand of assessed value. No action of the Board can increase this limit. This tax rate is \$0.2232 per \$1,000 of assessed value and was approved by the Budget Committee.

BE IT RESOLVED that the Board of Directors of Lane ESD adopts

the 2025-26 budget, makes appropriations, imposes property taxes, and categorizes taxes as outlined in the attached resolution.

Board Chair

Resolution Adopting the Budget, Making Appropriations, Imposing Taxes, and Categorizing Taxes 138

E. Approve Grants

Lane ESD shall pursue federal, state or private grants or other such funds that will assist the ESD in meeting adopted Board and ESD goals.

Proposals for external funds will be submitted to the Board for evaluation and approval.

In the event an opportunity arises to submit a grant proposal and there is insufficient time to place it before the Board, the superintendent is authorized to use his/her judgment in approving it for submission. The superintendent will review the proposal with the Board at its next regular meeting. The Board reserves the right to reject funds associated with any grant which has been approved.

The Board shall, before acceptance of such funds, consider the district's obligations, expectations or encumbrances when the grant ceases.

BE IT RESOLVED that the Board of Directors of Lane ESD approves the State Summer Learning Grant (2025) and Early Literacy Success Community Grant proposals as submitted to the Board.

Superintendent Scurto

Migrant Education Summer School Grant 140

Early Literacy Grant–Partnership with Eugene 4J 145

F. Approve Tentative Agreement with Lane County Education Association

Board Chair, Superintendent

Bargaining 2025 Tentative Agreement 148

G. Adopt 2025-26 Board of Directors Meeting Calendar

Proposed meeting dates are as follows:

- July 29, 2025 (organization)
- September 9, 2025 (September 2 is day following Labor Day)

- October 7, 2025
- November 4, 2025
- December 2, 2025
- January 6, 2026
- February 3, 2026
- March 3, 2026
- April 7, 2026
- May 5, 2026
- June 2, 2026

Superintendent Scurto

H. Approve Policy Recommendations: Second Reading (Section D)

Recommendations from Policy Committee:

BE IT RESOLVED that the Board of Directors of Lane ESD adopt policy updates as presented.

Delete Policies

DA

DBC

DBD

DC

DFD

DFD-AR

DFH

DI-AR 1 & 2

DIA

DIA-AR

DJC v.1

DJC-AR v.1

DJCA

DK

Update Policies

DB

DBE

DBEA

DBI

DBJ
DBK
DD
DDA
DFA
DFA-AR
DH
DIC
DID
DIE
DJ
DLC

Recommend Adopt New

DJC v.2
DJC-AR v.2
DN v.1

Board Chair, Superintendent

DA	152
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I. Sole Source Procurement

Approve sole source procurement for the purchase of services and authorize electronic notice of intent to award.

Superintendent, Director of Business Services

Upbeat Justification 228

10. Discussion/Reports

A. Legislative Update

Superintendent Scurto will provide an update in legislative activities if there are any updates.

Superintendent Tony Scurto

B. Superintendent Report

Superintendent Tony Scurto

C. Policy Updates: First Reading (Section E)

At last month's meeting of the Board, the Board first read policies reviewed in the OSBA desk rewrite from Chapter D. This month, the following policies from Chapter E are being presented to the Board as a first read:

Board Chair, Superintendent

Section E Drafts--First Read

230

11. Information from Administrative Staff

The directors of School Improvement, Special Education, and Technology Services have submitted written reports to the Board on matters of interest concerning their area of responsibility.

Administrative Staff

12. Board Member Reports and Comments/Agenda Planning

Lane ESD Board, Liaisons, Advisors

A. Agenda Planning

Board members are invited to send agenda items to be considered for the next board meeting. Please call or email to the Board Chair or Superintendent.

Board Chair

B. Board Member Reports

Board members are asked to submit their reports in writing to be attached to Boardbook. Reports can be sent to the Executive Assistant in advance of the meeting.

As Board Members prepare their reports, please consider the following questions:

1. What programs did I visit over the last month? What committees did I participate in?
2. What is the connection to the LESD services and programs to the component districts or community?
3. What significance or meaning does the activity have to the broader community?
4. What are the next steps or follow-up activities planned?

Sherry Duerst-Higgins
Linda Hamilton

Leslie Harris

Nora Kent

Sydney Kissinger
Vanessa Truett

Rose Wilde

TBD, Superintendents' Council Advisor
Mike Anderson, Liaison, Creswell School District
Danna Brownell, Liaison, McKenzie School District
Ericka Thessen, Liaison, Eugene School District
Robin Zygaitsis, Liaison, Bethel School District

Board, Advisors, Liaisons

13. Announcements/Correspondence

Board Chair

A. Acknowledgements and Recognition

Superintendent Tony Scurto

B. Kudos

Thank you to those who took the time to acknowledge co-workers/staff with kudos. Employees and Board members can submit a "kudo" any time during the month. To submit a kudo visit:
www.lesd.k12.or.us/forms/kudos.html

Administrators

C. Announcements

Board Chair

Copy of Youthiddmhsummit

356

1. **Lane ESD Board Member Activities and Opportunities**

June 4, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

June 7, 2025, Oregon School Board Members of Color Caucus Leadership Council Meeting

June 10, 2025, OSBA Executive Committee Meeting

June 14 and 19, 2025

ECC/CCAN is supporting two Juneteenth community events:

(1) Juneteenth Celebration on June 14th from 12pm-6pm

(2) Juneteenth Gathering: Celebrate Freedom on June 19th at the Farmers Market Pavilion in Downtown Eugene

June 22, 2025, Oregon School Board Members of Color Caucus Officers Meeting

July 2, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

July 8, 2025, OSBA Executive Committee Meeting

August 6, 2025, Oregon LGBTQIA2S+ School Board Members Advisory Committee Meeting

August 8-10, 2025, OSBA Summer Board Conference

August 12, 2025, OSBA Executive Committee Meeting

August 13, 2025, Oregon School Board Members of Color Caucus Leadership Council Meeting

August 21, 2025, Equity Community Consortium Event - More details to follow

September 2, 2025, Oregon Rural School Board Member Caucus Executive Committee Meeting

September 18, 2025, Equity Community Consortium Event - More details to follow

October 16, 2025, Equity Community Consortium Event - More details to follow

November 6-8, 2025, OSBA Fall Convention

February 6, 2026, OSBA Bonds, Ballots and Buildings Conference

*Lane ESD All Staff Welcome Back Date TBD

2. Component District Board Meeting Dates

Bethel: During the regular school year the school board meets on the 2nd and 4th Wednesdays of the month at 6pm for regular sessions. The Board will conduct only one meeting in November, December, March and May, when the board meets on the 2nd Wednesday only.

Blachly: The District Board typically meets on the second Wednesday of each month at 6:00 pm, location TBD.

Creswell: Regular Board of Director meetings are typically held the second Wednesday of each month at 6:00 PM.

Crow-Applegate-Lorane: The Board of Directors for Crow-Applegate-Lorane School District #66 holds a regular meeting at 7:00 pm on the third Thursday of each month. The meetings are held at Applegate Elementary School and at the Lorane Grange.

Eugene: The Eugene School Board usually meets in regular public sessions on the first and third Wednesdays of each month at 7 p.m. This schedule sometimes varies, and additional meetings and work sessions are scheduled as necessary.

Fern Ridge: Third Monday of the month, unless otherwise noted. Time: 6:30 p.m.

Junction City:

Lowell: Regular Board Meetings are scheduled for the 4th Monday of the month, with the Meeting beginning at 4:00 pm

Mapleton: The Mapleton School Board meets on the third Wednesday of each month. There is no meeting during the month of July. The School Board meeting is held in the high school at 6:00pm, unless otherwise noted.

Marcola: Regular board meetings are scheduled for the 2nd Monday of each month at 6 PM.

McKenzie: McKenzie School Board meetings are held on the third Wednesday of each month unless noted otherwise.

Oakridge

Pleasant Hill

Siuslaw: The board of directors meet the second Wednesday of each month with the exception of a regular meeting scheduled for August 21, 2024, and November 20, 2024 . The board normally meets in the district board room located at 2111 Oak Street in Florence, Oregon. The meetings are scheduled to begin at 6:00 p.m. with a work session and the regular meeting will begin at approximately 6:30p.m.

South Lane: The South Lane School Board usually meets in regular public sessions on the first Monday and third Monday of each month at

5:30 p.m. for a work session. Meetings normally are held at the South Lane School District Office, 455 Adams Ave in Cottage Grove.

Springfield: The Board of Directors generally meet on the second and fourth Mondays of each month. Regular business meetings begin at 7 p.m. on the second Monday and work sessions are generally held at 5:30 p.m. on the fourth Monday of the month. All meetings, unless otherwise noted, are held in the Board Room of the Springfield Public Schools Administration Building

14. Adjournment

The next regular meeting is scheduled to be held Tuesday, July 29, 2025, at the Lane ESD Main Campus, 1200 Highway 99 N, Eugene, OR 97404.

Lane ESD Board Self-Evaluation

6 responses

[Publish analytics](#)

Evaluation Survey Questions

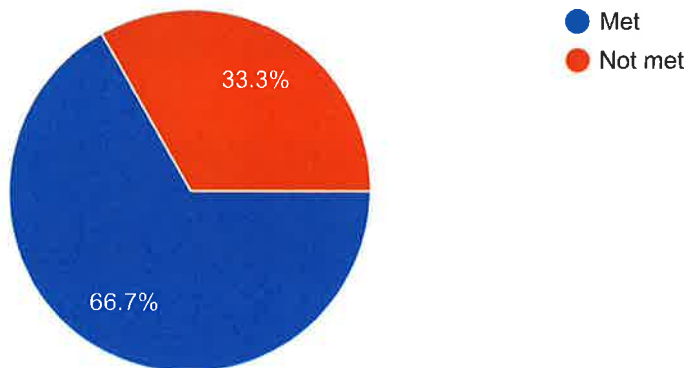
Please evaluate each indicator by your belief that the Board of Directors has either met or not met the indicator described.

 Copy

Indicator: Each Board Director will [review policies](#) in Section A/B - Board Governance and Operation and Section C - General Administration (Superintendent) yearly.

Purpose: To have a refreshed working knowledge of policies most overseen/carried out by the Board.

6 responses





Indicator: Each Board Director will review yearly the [Oregon Revised Statute in Chapter 334: Education Service Districts](#), specifically:

334.100 Organization of board; meetings; quorum; compensation

334.125 Status of board; powers and duties; rules

334.175 Core services; local service plan

334.177 Expenditure of percentage amounts received on services

334.219 Report on performance and finances; distribution and accessibility of report

334.225 Superintendent; duties; compensation

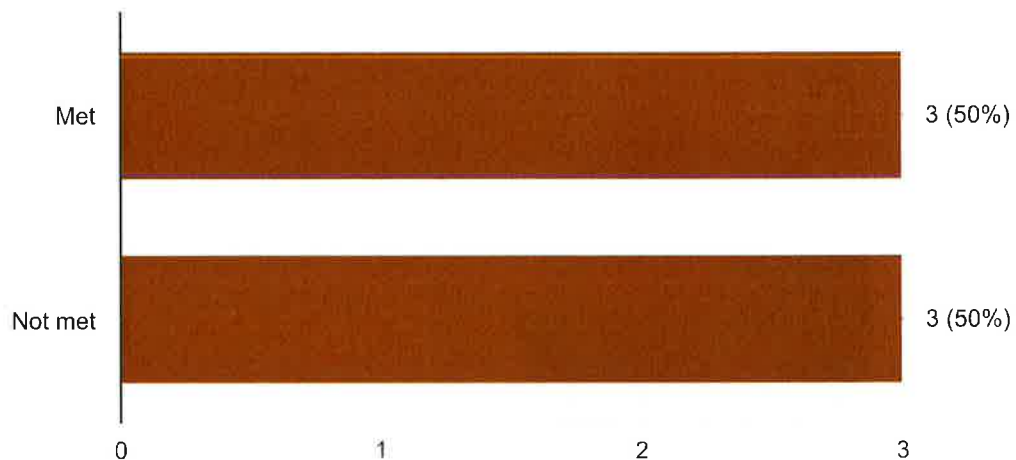
334.285 Apportionment of taxes; split between elementary and secondary school purposes

334.293 Direct ad valorem tax required to pay bonds

334.370 Emergency aid fund

Purpose: To have a refreshed working knowledge of specific areas requiring Board oversight and action as set forth in ORS 334: Education Service Districts.

6 responses



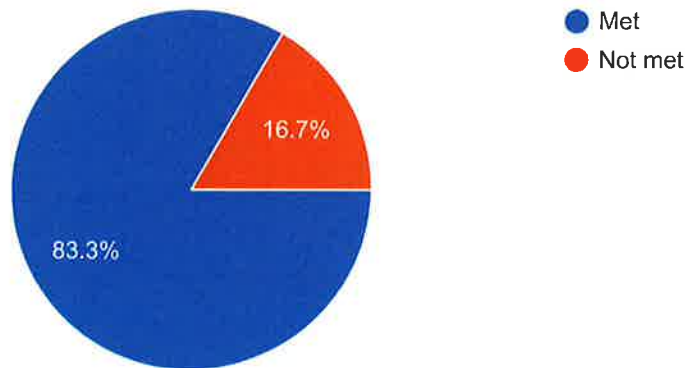


Indicator: Each Board Director will serve on at least one Superintendent Work Group, ESD Committee, OSBA committee, OAESD Committee or other relevant committee or work group during the year.

Purpose: To provide variety and inclusivity to leadership and direction of the agency.

Artifact: Superintendent Work Group Member list and Committee Lists (e.g. Labor Management Team)

6 responses

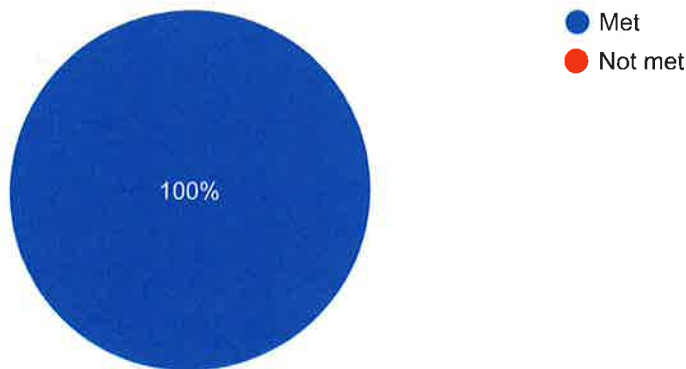


Indicator: Each Board Director shall complete Recognizing and Responding to Child Neglect and Abuse in Oregon.

Purpose: To provide the Board Directors with the information necessary to complete their duties as a mandatory reporter of child abuse in Oregon.

Artifact: board member training records.

6 responses



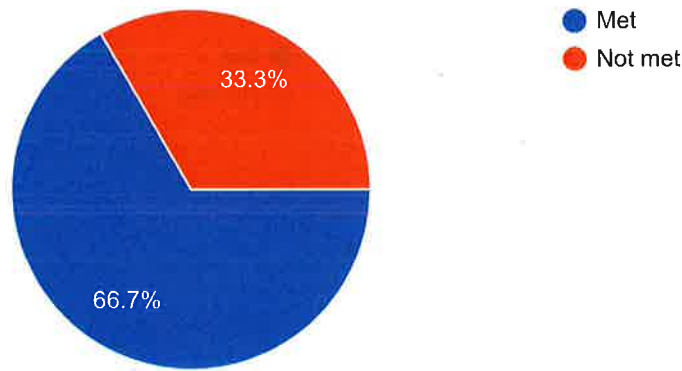


Indicator: Yearly, the Board will meet in work session to review the [LESD Strategic Plan](#) and update, as necessary, the Mission, Vision, Values, Goals, and Board Objectives.

Purpose: To ensure Board goals align with priorities and needs of the agency, component districts, OSBA, and ODE priorities.

Artifact: LESD Strategic Plan

6 responses

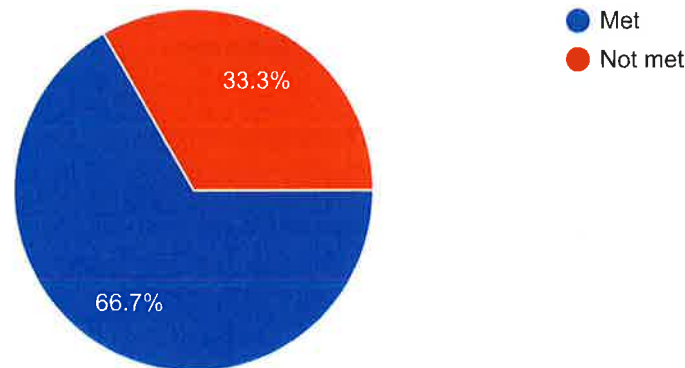


Indicator: The Board will work in association with the Superintendent, Deputy Superintendent, Cabinet, and as a Governing Body to fulfill Board Goals as set in the Yearly LESD Strategic Plan Tasks.

Purpose: To participate in shared governance related to the LESD Strategic Plan.

Artifact: Monthly target milestones met as reported in monthly Strategic Plan Reports as part of the regular Board meeting agenda items.

6 responses





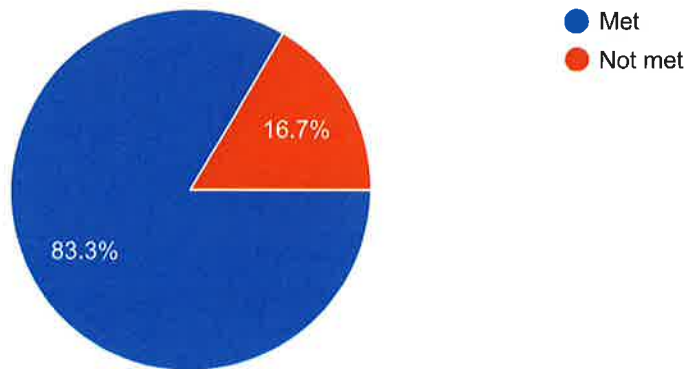
Indicator: Yearly, the Board will meet in work session to review and update, as necessary, Board developed guidelines related to:

- Typical Roles/Responsibilities of the Board and Superintendent
- Role of the Board Chair
- Board Member Ethics
- Board and Superintendent Working Agreements

Purpose: To foster good working and communication between Board members and the Superintendent and to clarify roles and responsibilities.

Artifact: Work session minutes.

6 responses



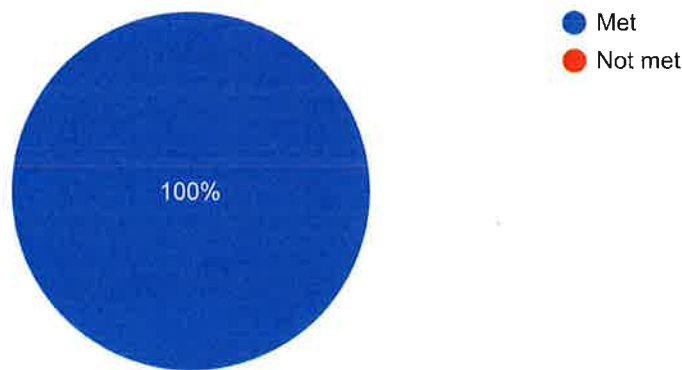


Indicator: Yearly, by December 31, or at date agreed upon by board and superintendent, the Board will evaluate the Superintendent or indicate if their contract will or will not be renewed as part of the rolling three year contract.

Purpose: Statutory responsibility of the Board.

Artifact: Board meeting minutes from date of contract adoption or renewal.

6 responses

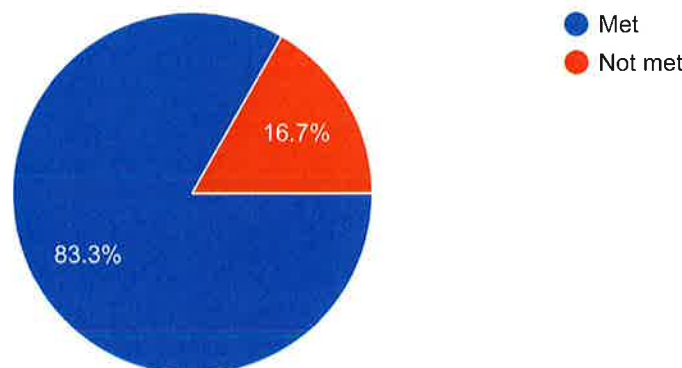


Indicator: Board shall adopt goals related to the strategic plan and superintendent/district goals annually.

Purpose: To unify board behind a specific set of goals that support the work of the agency staff.

Artifact: Work session and board minutes from goal setting meeting.

6 responses





Indicator: Board shall review and update the Statement of Accountability: Land Acknowledgement statement and workplan annually.

“Lane ESD Board of Directors Land Acknowledgement

Lane ESD acknowledges that the lands we call Lane County - the lands that sustain our children, our future, and our collective well-being - are the traditional ancestral home of the Kalapuya, Siuslaw, Molalla, and other indigenous people who have lived in Lane County since time immemorial. Native children, families, and communities bear witness to a legacy of displacement and forced relocation. As an educational institution we are accountable for addressing the current and former silencing, erasure, and genocide of native people in Oregon and Turtle Island. We aim to join with indigenous people, honoring their resilience, courage, and self-determination in a purposeful pursuit of justice.

Today indigenous people -- alive, diverse, and vibrant -- live in and contribute to the culture of Lane County. We are all blessed by their presence.

We commit to support our own, Lane ESD staff, and student learning about indigenous peoples of Oregon, the history, culture, current concerns, and the role of educational institutions in the genocide of Native/Indigenous people and tribes and in the possibilities for repair and justice. As an ESD we will support and encourage the implementation of Tribal History/Shared History curriculum with all our educational partners. The board also commits to building relationships that would help us understand the lived experiences of our native students' families and communities and how LESD impacts our students, in collaboration with the superintendent. The board will review and update the spoken Statement of Accountability Land Acknowledgement annually during our annual organizational meeting or when needed.”

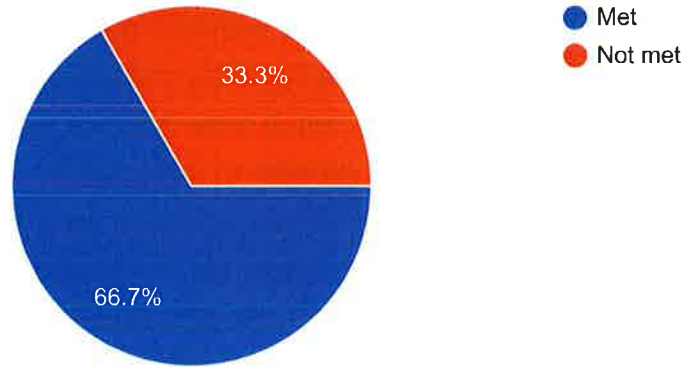
Purpose: To promote positive relationships between Tribes, tribal members, and nonaffiliated Native Americans and Lane ESD by increasing the knowledge of and connection to Oregon Tribes and other Native Americans.

Artifacts: Board meeting minutes from date of review or update; Board Member reports and training records relating to learning about the indigenous people of Oregon, Board Meeting minutes from presentations



or meetings related to education about or relationships with Oregon Tribes, their members, or other Native American students, families, and community members.

6 responses



Comments

4 responses

Linda Hamilton

The board comes to meetings prepared having read the agenda and all materials related to the meeting. All board members attend on a regular basis, either in person or on zoom. The board is active in their community and attend events for education. The board gets along Faily well and commutates with other board members and the superintend. The board members respect staff and has a good working relationship with them. we work together as a team

The board has met the most critical markers but needs work on the less critical ones.

I do not have the data regarding other board member actions, so I answered only for my own personal experience.

Thank you.

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Google Forms







2025-2026

Proposed Budget

Our shared commitment to equity, empowerment, and collaboration in education.

Proposed Budget

July 1, 2025 - June 30, 2026

Prepared by Business Services

1200 Highway 99 N

Eugene, OR 97402

541-461-8289

www.lesd.k12.or.us



Lane ESD's summer migrant education program centers on culture, community, relationships, and learning.

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About Lane Education Service District

Oregon has more than 1,200 public K-12 schools organized into 197 School Districts and 19 Education Service Districts (ESDs). ESDs provide regional services to their component school districts, primarily in areas that the school districts alone would not be able to adequately and equitably provide. These services include: Programs for Children with Special Needs, Technology Support, School Improvement Services, and Administrative and Support Services.

Lane ESD provides services to sixteen component districts in Lane County. Our purpose is to **SERVE** our communities!

Support - Provide comprehensive services in technology, school improvement, special education, and administrative services that support our component districts' missions to achieve equitable outcomes for all students.

Empower - Empower educators, students, and communities by offering professional development and innovative programs to enhance culturally responsive-sustaining learning experiences.

Resource - Deliver fiscally sound services that support equitable allocation for students countywide.

Vision - Cultivate a clear vision for educational excellence and equity, guiding strategic planning, and fostering a shared mission among Lane County's invested communities.

Engage - Promote engagement and collaboration among educators, families, and community partners to create a supportive educational environment that promotes justice-centered engagement for all invested communities.

Component School Districts

Bethel
Blachly
Creswell
Crow-Applegate-Lorane
Eugene
Fern Ridge
Junction City
Lowell

Mapleton
Marcola
McKenzie
Oakridge
Pleasant Hill
Siuslaw
South Lane
Springfield



Board of Education

Lane ESD is governed by a citizen-elected Board of Directors and an appointed advisor representing employment training. Five of the Board positions represent geographical zones and two are designated at-large. All members serve four-year terms.



Sydney Kissinger
Zone 1 (Eugene-North)



Leslie Harris
Zone 2 (Eugene-South)
Vice-Chair



Vanessa Truett
Zone 3 (Springfield)



Nora Kent
Zone 4 (West/North County)



Sherry Duerst-Higgins
Zone 5 (East/South County)
Chair



Rose Wilde
Zone 6 (At Large)



Linda Hamilton
Zone 7 (At Large)

Component District
Board Liaisons:
Erin Zygaitis (Bethel)
Mike Anderson (Creswell)
Ericka Thessen (Eugene)
Danna Brownell (McKenzie)

Component District
Superintendent Advisor:
Rotating

Budget Committee

The budget committee consists of the elected Board members and eight members appointed by the Board from component school district boards or designees of component district Boards. The members appointed by the Board shall consist of five members selected by ESD zone and three members selected at large.

The budget committee reviews the proposed budget as presented by the superintendent, receives public comment, and concludes its work by recommending a budget and a tax levy.

Position	Appointed Member	Zone	Component District	Term Ends
1	Jenny Jonak	1	Eugene	June 30, 2026
2	Mike Anderson	2	Creswell	June 30, 2027
3	Tom DiLiberto	3	Eugene	June 30, 2027
4	Dwight Coon	4	Blachly	June 30, 2027
5	Jim Chapman	5	Lowell	June 30, 2025
6	Andrea Larson	At-Large	Fern Ridge	June 30, 2025
7	Robin Zygaitis	At-Large	Bethel	June 30, 2025
8	Mizu Burrus	At-Large	Mapleton	June 30, 2026

Budget Calendar

April 1, 2025	Board meeting: worksession for budget committee pre-meeting to provide overview of budget process, roles and responsibilities of budget committee, financial update, and budget outlook
April 7 - May 2, 2025	Publish notices of budget committee meeting - one internet notice and one newspaper notice
May 6, 2025	Budget committee meeting: receive superintendent's budget message; take public comment; review proposed budget; approve budget and tax levies
May 20, 2025	Second budget committee meeting (if necessary)
May 26 - 30, 2025	Publish notice of budget hearing and Form ED-1 (Financial Summary)
June 3, 2025	Board meeting: hold public hearing on approved budget; adopt resolution adopting budget, authorizing appropriations, and declaring taxes
June 4 - July 15, 2025	Submit board resolution and Form ED-50 (Notice of Property Tax and Certification of Intent to Impose a Tax on Property) to county assessors



Superintendent's Budget Message

Budget Committee Members, Colleagues, and Education Partners:

As we embark on the 2025-26 budget year, I would like to express my gratitude for the hard work and dedication of our educators, staff, and the continued support of our school communities.

This proposed budget was compiled with great attention to our sixteen regional school districts and the students and families we both serve. A large guiding role in preparation of this budget is attention to our Board-adopted [Strategic Plan](#) and application of our Equity Lens. As we continue to navigate uncertain times, our focus remains steadfast on being proactive and responsive; this proposed budget reflects our commitment to providing a high-quality education for all students while addressing the evolving needs of our districts, students, and families.

The development of this budget was a collaborative effort, starting with the creation and approval of a [Local Service Plan](#), which serves as a foundational document for Lane ESD and our component school districts. The Local Service Plan defines the range of services and programs offered and clarifies how resources, staffing, and funding will be allocated to support districts effectively. With this document, districts can make informed decisions about which services best align with their unique needs and goals, selecting from an available menu each year.

The Budget at a Glance

This proposed budget was constructed using State School Fund and Grant in Aid estimates from the Oregon Department of Education (ODE) and other state agencies, alongside estimates of purchased services from our component districts and other education partners. The 2025-26 proposed budget includes a total investment of \$79.4 million represented by five separate funds, with the largest being the Special Revenue Fund. The total budget for all funds is 8.8% higher than the 2024-25 budget, which reflects increases in local and state funding along with corresponding increases in salaries, benefits, and services.

The General Fund represents 46% of the 2025-26 proposed budget for all funds and accounts for all operating activities of the ESD except those activities required to be accounted for in another fund. General Fund revenues come from two main sources – local property taxes and the State School Fund. The General Fund budget totals \$36.0 million, representing an increase of \$4.7 million or 14.9% from 2024-25. The majority of the increase in General Fund resources is due to typical increases in property taxes and an increase in state school funding that addresses some long standing deficiencies with the state's calculation of the current service level.

Increases in General Fund requirements reflect a small increase in staffing that aligns with services requested by districts. Salaries and benefits comprise the majority of planned expenses at \$21.7 million

or 65% of all current requirements and in addition to the staffing changes, salary and benefit increases also include modest cost of living adjustments and a significant increase in PERS pension contributions.

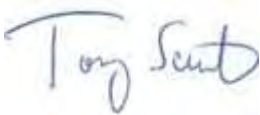
To ensure long-term sustainability, we have implemented measures to deliver the best educational program available within the constraints of well-managed resources. Recognizing the importance of a budget that delivers sustainable levels of services, this budget is structurally balanced, where recurring revenues equal or exceed recurring expenditures. The General Fund budget projects an operating surplus of \$90,000, resulting in an unassigned ending fund balance of \$2.5 million, or 7.7% of operating revenues, on June 30, 2026.

The Special Revenue Fund represents 52% of the 2025-26 proposed budget for all funds and accounts for local, state, and federal resources received by the ESD that support specialized and innovative programs or services at no cost to districts. Budgeted Special Revenue Fund resources and requirements total \$41.6 million, an increase of \$1.6 million or 4.0% from 2024-25. Changes in the Special Revenue Fund budget primarily reflect programmatic shifts that align with new grants.

Conclusion

Despite the myriad pressures and challenges we continue to experience, this budget once again demonstrates our resilience and shared commitment to equity, empowerment, and collaboration in education. Special thanks go to our Executive Director of Business Services, Olivia Meyers Buch and her talented team. I encourage you to review the detailed budget document and participate in the budget process; **your feedback is valuable as we work together to create a brighter future for our students.**

Sincerely,



Tony Scurto
Superintendent



How Services are Funded

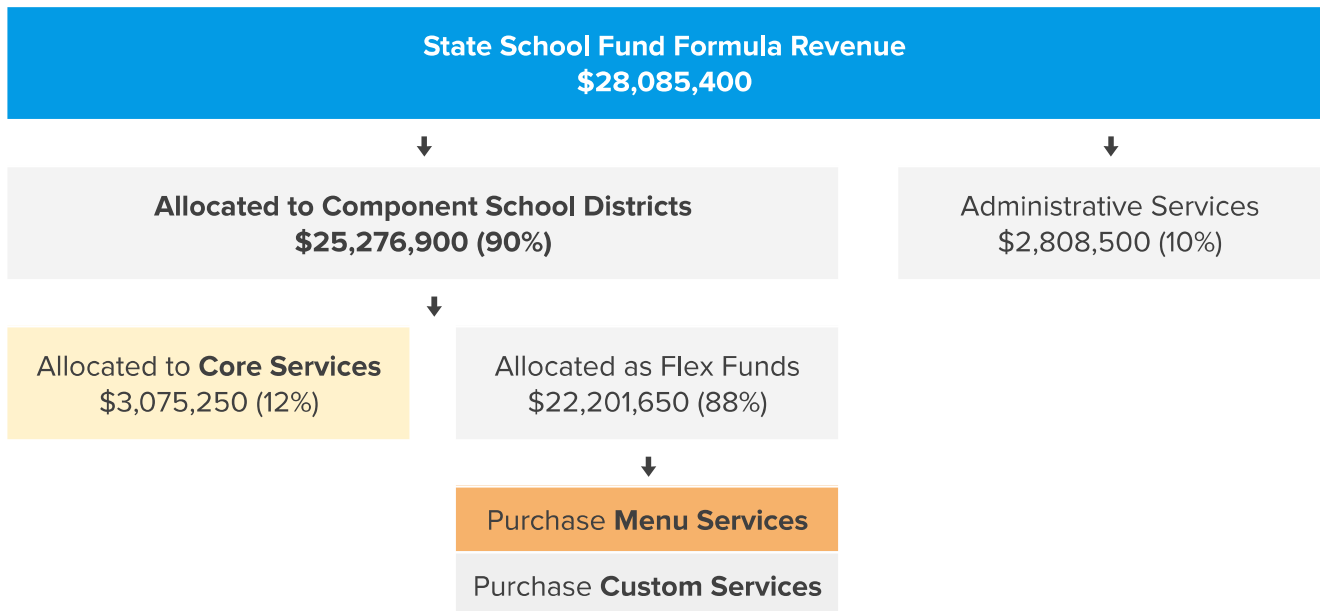
State School Fund resources are provided to ESDs to offer services for children with special needs, technology, school improvement, and administrative support to component school districts as described in the Local Service Plan. Pursuant to ORS 327.019, 90% of these resources are allocated to component school districts based on weighted student population (ADMw).

Of the amount allocated to districts, approximately 12% goes directly to services available to all districts (Core Services), while approximately 88% is allocated as flex funds, which can be used to purchase services through the local service plan menu (Menu Services or Custom Services).

Core Services provide stability and flexibility in meeting student needs where the level of support may vary from district to district and year to year; this commitment supports the equitable distribution of resources for students county-wide and basic operational needs.

Menu Services are optional for districts to choose from using their allocated Flex funds and individual district budgets.

Custom Services can be requested by an individual district or group of districts based on a specific need. These services may include staffing or the provision of services.



**State School Fund Formula Revenue
Allocated to Component School Districts as Flex Funds**

District	ADMw	Allocation	%
Bethel	6,042.46	\$ 2,657,600	11.97%
Blachly	504.52	221,900	1.00%
Creswell	1,287.68	566,300	2.55%
Crow-Applegate-Lorane	427.08	187,800	0.85%
Eugene	18,302.67	8,049,950	36.26%
Fern Ridge	1,631.66	717,600	3.23%
Junction City	1,827.76	803,900	3.62%
Lowell	1,269.81	558,500	2.52%
Mapleton	282.73	124,400	0.56%
Marcola	1,140.80	501,700	2.26%
McKenzie	358.13	157,500	0.71%
Oakridge	673.62	296,300	1.33%
Pleasant Hill	1,099.94	483,800	2.18%
Siuslaw	1,395.65	613,800	2.76%
South Lane	3,311.32	1,456,400	6.56%
Springfield	10,923.10	4,804,200	21.64%
TOTAL	50,478.93	\$22,201,650	100.00%

In addition to State School Fund resources, **Grants and Contracts** support specialized, innovative, and often temporary programs or services with qualifying conditions at no cost to districts. The ESD intentionally applies for grants that extend the services of the four component areas provided through the State School Fund to support the educational mission of the county.

State and Federal Contracts are in place to ensure that the ESD supports school districts in implementing state and federal educational policies and programs, complies with mandates, and provides specialized services.

Grants are targeted funds that the ESD has identified and applied for to support specific educational programs and initiatives for the component districts.

Overview of Core Services

Core services are available to all component districts at no cost and represent approximately 12% of the local service plan allocations to districts.

SERVICE AREA	SERVICE	DESCRIPTION
<i>Programs for Children with Special Needs</i>	Life Skills High-Cost Pool	Provides funds to districts with an overrepresentation of Life Skills students (including districts that do not participate in the ESD Life Skills consortium).
<i>Technology Support</i>	Network Services	Provide high-speed internet access, CIPA-compliant internet filtering, 24-7 internet connectivity monitoring, and utilization reporting with reliability and equitable access as the focus areas.
	Professional Development	Organize regional professional development opportunities and support local partnerships, including an internship program.
	Technology Leadership	Facilitate opportunities for regional technology leaders to provide problem-solving collaboration, job-alike groups, state and regional initiatives, consortium purchases, lifecycle plan assistance, and director mentoring and coaching.
	Grant Support	Assistance in the writing, coordination, and implementation of county-wide grant activities
	Cybersecurity	Assist with developing and maintaining incident response plans, cybersecurity handbooks, insurance compliance, vulnerability scanning and reports.
<i>School Improvement Services</i>	Curriculum and Instruction	General education curriculum and instructional services include professional development, coaching, and consultation to assist districts in curriculum adoption, instruction, and assessment. Lane ESD has content specialists in Health, Social Studies/Ethnic Studies, English Language Arts, Math, Science, Career Connected Learning, and Project Based Learning.
	Curriculum Leaders	This network meets monthly during the school year and comprises district and building administrators from all 16 component districts. Experts on topics of interest give presentations, the work of component districts is featured, resources are shared, and leaders can network with job-alikes across districts.

	Promise Programs	The Lane Regional Promise supports teachers in obtaining College Now endorsements to offer college credit for courses taken in high school.
	Lane Career Academy	The Lane Career Academy collaboration provides Lane County students with technical education to access high-wage, high-demand jobs. Current programming includes HOPE Factory (construction/manufacturing); future programming to include Emergency Medical Services (EMS) and Behavioral Health.
Administrative and Support Services	Home School	Home Schooling is a mandated service in which Lane ESD is responsible for accepting notifications from parents or guardians who intend to educate their children at home. Lane ESD is a primary information source for parents, students, schools, and districts. The ESD is also responsible for monitoring compliance with homeschool notification requirements, monitoring academic progress requirements, and providing detailed reports to districts.
	Attendance and Truancy Services	Attendance and truancy support assist component school districts in meeting legal requirements regarding mandatory school attendance. This is a state-mandated service for districts with less than 1,000 students.
	Connected Lane County	A contribution to Connected Lane County supports the collaborative work between districts, industry partners, workgroups, and community organizations to create opportunities and prepare underserved youth for their lives beyond high school.
	Oregon Licensed Contract Dashboard	Subscriptions to RS2's interactive Oregon Licensed Contract Dashboard provide access to licensed salary, benefits, insurance contributions and work schedules with the ability to create custom comparison groups.

Overview of Menu Services

Menu services are available for individual districts to purchase as needed using flex funds or other district resources.

SERVICE AREA	SERVICE	DESCRIPTION
Programs for Children with Special Needs	Life Skills Consortium Placements	<p>The Life Skills Education Program serves students with moderate, severe, and profound disabilities. Kindergarten through grade 12 classrooms are located in several elementary, middle, and high schools throughout Lane County. Students ages 18-21 are served in the Transitions Program.</p> <p>The Intensive Services Program (ISP) serves students whose support needs require environmental modifications that may not be feasible on a general education campus.</p>
	Lane School Placements	Lane School is a structured behavior and academic program for kindergarten through grade eight students who experience significant behavioral, social, and educational difficulties.
	Behavior Disorder Consultants	Behavior Disorder Consultants provide in-service training and consultation to districts for behavior and classroom management and strategies for working with students identified as having emotional and behavioral disabilities.
	School Psychologists	School Psychologists provide assessments to assist districts in determining student eligibility for special education, coordination assistance, and consultation with district staff, parents, and other professionals.
	Speech Language Pathologists	Speech Language Pathologists (SLPs) support districts in assessing and providing Individualized Education Plan (IEP) related services to students with communication disorders, including articulation, cognition, language, literacy, social skills, fluency, voice, and hearing. SLPs also support Safe Eating Teams, helping establish and train protocols and guidelines for safe eating at school.
	Augmentative Communication	Augmentative Communication services include evaluation, IEP support, programming equipment, and consultation with classroom teachers and specialists.

	Direction Service	Direction Service provides information and referral services to parents and districts regarding specialized services for families of students with disabilities. Direction Service also acts as a mediator between districts and parents of children with disabilities and focuses on collaborative dispute resolution.
	Sign Language Interpretation Services	Sign Language Interpreters facilitate communication for Deaf or Hard of Hearing (DHH) students during school hours and for school-related activities. Interpreters may also act as a resource or provide training to staff and students. Interpreters may also offer services to provide ADA accommodations for school staff and families.
	MLK Jr. Education Center	The Martin Luther King, Jr. Education Center is a partnership between Lane ESD and the Lane County Department of Youth Services, providing an educational program for students with an active case with the Department of Juvenile Justice.
	Nursing Services	School Nurses provide services for students with medical conditions that may interfere with their ability to participate in their educational program. School Nurses develop Health Management Protocols, which outline specific supports needed for each student, train staff to recognize and respond to students' medical needs, and delegate medication administration and health protocols.
Technology Support	Application Hosting and Management	Cloud and on-prem solutions, e.g. video streaming services, backup solutions, help desk solutions, cloud solutions and applications, and technology inventory solutions.
School Improvement Services	Career and Technical Education	Career and Technical Education (CTE) staff provide leadership and services to districts so that students can enhance their 21st-century technical skills, career exploration, and successful transition to work or extended schooling.
	Library Services	Library services support districts in meeting Division 22 library and media services standards. Professional development, coaching, and consultation are provided for districts that elect this service.
Administrative and Support Services	Substitute Teacher List Subscription	Lane ESD maintains a list of approved substitute teachers and provides support with registration, training, and orientation to applicants.
	Courier Services	Lane ESD's courier services provide an efficient and secure method of moving materials between the ESD, districts, and other public agencies.

Overview of Grants and Contracts

Through support from grants and contracts, Lane ESD provides certain value-added services at no cost to districts.

SERVICE AREA	PROGRAM	DESCRIPTION
Programs for Children with Special Needs	Early Intervention / Early Childhood Special Ed	Contracted service with the University of Oregon Early Childhood CARES. Grant provides EI (birth-3) and ECSE (3-5) education services to all Lane County resident families with children with qualifying special education eligibility.
	Lane Regional Inclusive Services	LESD Regional Inclusive Services works in collaboration with Local School Districts, Early Intervention, Early Childhood Special Education (EI/ECSE) programs, Families, and Community Agencies to provide specialized educational support for children with low incidence disability eligibility, including Autism Spectrum Disorder (ASD), Orthopedic Impairments (OI), Traumatic Brain Injury (TBI), Visual Impairments (VI), Deaf/Hard of Hearing (DHH), and DeafBlind (DB). This grant also supports audiology referrals and a Hearing Assistive Technology Equipment Lending Library.
	State Hospital	The Oregon State Hospital Education Program offers opportunities for 18 to 21-year-olds to continue their education while in the hospital setting.
	Juvenile Detention Education Program	The Juvenile Detention Education Program (JDEP), funded by the Oregon Department of Education, provides educational and re-entry transitional services to students housed overnight in county juvenile detention facilities.
	Regional Technical Assistance Program	Lane ESD provides local-level options for professional development and technical assistance within the general supervision areas (special education and federal title programs).
School Improvement Services	Western Regional Education Network	The Western Regional Educator Network (WREN) encompasses the 28 school districts in Lane ESD and Linn-Benton-Lincoln ESD. It is an educator-led, improvement-focused network that elevates teachers' voices, emphasizes the Lane ESD Equity Lens to interrupt historical patterns of inequities, and supports educators in creating more inclusive and empowering school cultures. Professional development, coaching, and consultation are provided.



Teacher Pathways	This Grow Your Own (GYO) grant funded program works to diversify the K-12 education workforce in Lane County by recruitment, selection, clinical practice, hiring placement, and induction support for pre-service teachers centered on building culturally responsive affinity groups.
Social Emotional Learning	Professional development, coaching, and consultation are provided to component districts to meet their goals of authentic implementation of Oregon's Transformation Social Emotional Learning (TSEL) standards,
School Safety and Prevention	Technical expertise, training, and system development is provided to districts in responding to threats of violence and suicide. Our SSPS is the lead responder and coordinator of the Tragedy Response Team.
Student Voice	Professional development, coaching, and consultation are provided to implement ongoing student voice and engagement for district/school strategic planning and continuous improvement.
LGBTQ2SIA+ Student Success	This grant funds technical assistance, professional development, curriculum development, and resources, to ensure focal LGBTQ2SIA+ students and their families are safe, feel a sense of belonging, and are supported to achieve at high levels across all Lane County districts.
Latinx Student Success	This grant funds technical assistance, professional development, curriculum development, and resources to ensure focal LatinX Students are safe, feel a sense of belonging, and are supported to achieve at high levels across all Lane County districts.
Native Youth Wellness	This grant funds the Native Youth Wellness program (NYW). NYW provides professional development on Tribal History/Shared History and TSEL, culture nights, student affinity groups, coaching on tribal education programs, equity, and culturally sustaining pedagogy.
Advanced Manufacturing & Construction	This grant supports a regional advisory committee and industry connections to strengthen the quality of CTE Programs of Study. This grant also sponsors the Construction Utility Career Day.
Behavioral Health Career Pathways	This grant provides curriculum, training, and work-based experiences focused on mental and behavioral health pathways between districts and industry partners via Lane Career Academy. Prioritizes rural and underserved communities.
Team Oregon Build	Professional development and technical assistance is provided on hands-on construction projects. The project provides pathways for career development while addressing the urgent need for safe and sustainable housing.



Healthcare Workforce Development	Coordinate scholarship and training support to remove cost barriers for students to participate in Behavioral Health and Emergency Services pathways within Lane Career Academy.
LaneSTEM	Lane ESD supports Science, Technology, Engineering, and Math (STEM) education in partnership with LaneSTEM through workshops, school site consultation, classroom coaching, and grant partnerships.
Early Literacy	Lane ESD supports district implementation of their Early Literacy plans by coordinating professional development via Oregon Department of Education contractors and community partners.
Administrative Burden Reduction	Technical assistance completing state and federal required reporting, grant applications, and data collections. The focus is primarily on small/rural districts, but Integrated Guidance technical assistance is provided for all component districts.
21st Century Community Learning Centers	Crow-Applegate-Lorane, McKenzie, Mapleton, and Siuslaw are in a consortium for the 21st Century Community Learning Centers (CCLC) grant. Lane ESD provides oversight and technical assistance on the completion of grant requirements.
English Language Development	English Language Development (ELD) services include technical assistance relating to curriculum, instruction, assessment, and educational learning platforms. Train general education teachers to learn how to integrate the English Language Proficiency (ELP) standards into their regular curriculum.
Migrant Education	Lane ESD coordinates a regional Migrant Education Program (MEP) consortium serving Lane and Douglas counties, including 29 school districts. MEP provides supplemental instruction, community outreach, and parent involvement for eligible MEP students, including summer school, graduation, and preschool services for students ages 3-21.
EA/IA Professional Development	Lane ESD contracts with Cultivate at the University of Oregon to provide professional development modules for Education / Instructional Assistants.
Portrait of a Graduate	Lane ESD contracts with Cosgrave and Swanson to consult rural districts on developing and implementing Portrait of a Graduate.

Summary of Proposed Budget

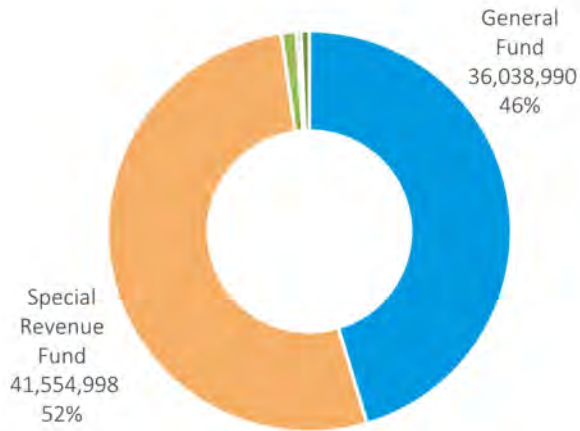


The Native Youth Wellness program provides professional development on Tribal History/Shared History and transformative social emotional learning, culture nights, student affinity groups, coaching on tribal education programs, equity, and culturally sustaining pedagogy.

All Funds

Resources and Requirements by Fund

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
100 General Fund	31,233,335	30,777,098		31,373,479		36,038,990		
200 Special Revenue Fund	38,083,524	34,169,272		39,965,000		41,554,998		
300 Debt Service Fund	913,285	949,061		916,855		954,703		
400 Capital Projects Fund	461,073	829,295		285,000		275,000		
600 Internal Service Fund	778,730	696,906		435,026		545,020		
Total Resources	71,469,947	67,421,631	-	72,975,360	-	79,368,711		
Requirements								
100 General Fund	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		
200 Special Revenue Fund	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		
300 Debt Service Fund	854,566	885,021	-	916,855	-	954,703		
400 Capital Projects Fund	216,778	829,295	-	285,000	-	275,000		
600 Internal Service Fund	360,656	562,436	-	435,026	-	545,020		
Total Requirements	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		
ENDING FUND BALANCE	-5,070,006	3,479,433						



Funds - Chart of Account Definitions

In governmental accounting systems, the entity is viewed as a group of smaller entities called funds. A fund is a fiscal and accounting entity with self-balancing accounts set aside to carry on a specific activity or to meet certain objectives in accordance with a specific regulation. The requirements and resources of a fund must always balance. Every budget has at least one fund (commonly called the General Fund) which is used for everyday operation of the local government. The most common reason for establishing a special fund is to account for a revenue source whose use is limited to a particular kind of expenditure.

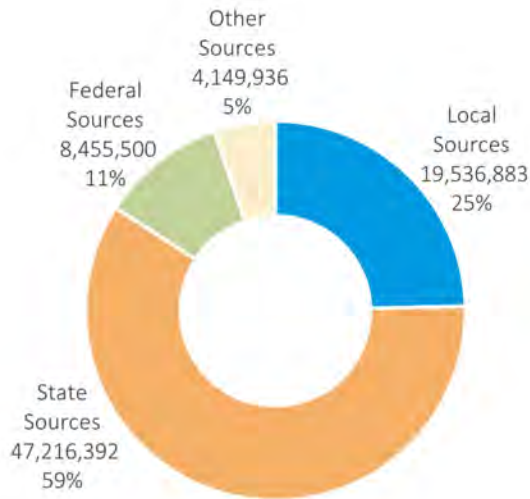
FUND TYPE		FUND COMPONENTS
100	General Fund	Accounts for all financial resources of the district except those required to be accounted for in another fund.
200	Special Revenue Fund	Accounts for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditure for specified purposes.
300	Debt Service Fund	Accounts for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.
400	Capital Projects Fund	Accounts for financial resources used to acquire or construct major capital facilities. The most common source of revenue in this fund would be the sale of bonds.
600	Internal Service Fund	Accounts for the operation of district functions that provide goods or services to other district functions, other districts, or to other governmental units, on a cost-reimbursable basis.

All Funds

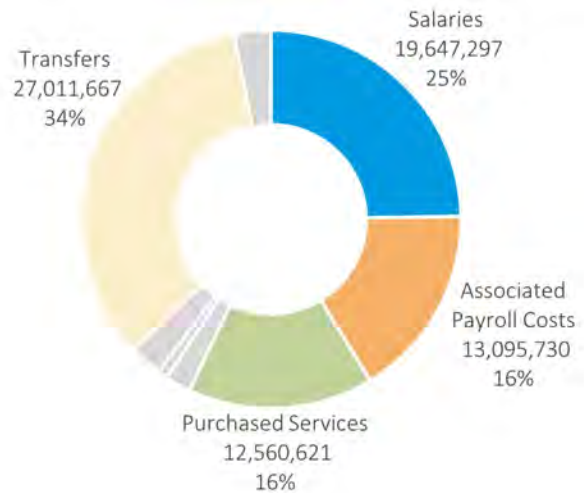
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	15,536,073	15,686,258		17,582,304		19,536,883		
2000 Intermediate Sources	-	-		-		10,000		
3000 State Sources	41,755,400	37,508,391		42,989,813		47,216,392		
4000 Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 Other Sources	6,505,433	5,924,179		3,487,243		4,149,936		
Total Resources	71,469,947	67,421,631		72,975,360		79,368,711		
Requirements								
100 Salaries	15,406,326	17,948,410	291.38	18,324,109	294.66	19,647,297		
200 Associated Payroll Costs	9,099,027	10,382,603		11,605,884		13,095,730		
300 Purchased Services	11,950,565	9,107,791		9,471,492		12,560,621		
400 Supplies and Materials	2,212,226	1,869,159		2,629,172		1,710,431		
500 Capital Outlay	930,199	2,083,723		618,940		659,181		
600 Other Objects	2,200,890	2,065,242		2,407,611		2,200,331		
700 Transfers	24,600,710	20,485,271		25,852,311		27,011,667		
800 Other Uses of Funds	-	-		2,065,842		2,483,453		
Total Requirements	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		
ENDING FUND BALANCE	5,070,006	3,479,431						

Resources



Requirements



Resources - Chart of Account Definitions

The Oregon Department of Education adopts a chart of accounts used by school districts to clarify revenues and expenditures. This chart of accounts is meant to define account classifications in a meaningful way to the users of financial information while conforming with Generally Accepted Accounting Principles (GAAP), a minimum standard and guideline for financial accounting and reporting. Revenues collected by school districts are first classified by fund, then by source.

SOURCE		SOURCE DESCRIPTION
1000	Revenue from Local Sources	Revenues from Local Sources include taxes levied by the district, revenue from the appropriations of other local governments, tuition, transportation fees, earnings on investments, food service revenues, extracurricular activity revenue, and other similar sources.
2000	Revenue from Intermediate Sources	Revenue received as grants by the district and revenue received from city and county income taxes are categorized here.
3000	Revenue from State Sources	State School Fund revenues are recorded here as well as all other restricted and unrestricted grants-in-aid received from state funds.
4000	Revenue from Federal Sources	All restricted and unrestricted revenue received from the federal government directly or through the state or through immediate agencies.
5000	Other Sources	Other sources of revenue include beginning fund balances, sale or compensation for the loss of fixed assets, long-term debt financing, and interfund transfers.

Objects - Chart of Account Definitions

Within each function, the estimates of line item expenditures are detailed by object. An object is the service or commodity bought.

OBJECT TYPE		OBJECT DESCRIPTION
100	Salaries	Amounts paid to employees of the district who are considered to be in positions of a permanent nature or hired temporarily, including personnel substituting for those in permanent positions. This includes gross salary for personal services rendered while ON THE PAYROLL of the district.
200	Associated Payroll Costs	Amounts paid by the district on behalf of employees; these amounts are not included in the gross salary, but are over and above. Such payments are fringe benefit payments, and, while not paid directly to employees, nevertheless are part of the cost of salaries and benefits.
300	Purchased Services	Services which, by their nature, can be performed only by persons or firms with specialized skills and knowledge. While a product may or may not result from the transaction, the primary reason for the purchase is the service provided. Included are the services of architects, engineers, auditors, dentists, medical doctors, lawyers, consultants, teachers, accountants, etc.
400	Supplies and Materials	Amounts paid for material items of an expendable nature that are consumed, worn out, or deteriorated by use; or items that lose their identity through fabrication or incorporation into different or more complex units or substances.
500	Capital Outlay	Expenditures for the acquisition of fixed assets or additions to fixed assets. These are expenditures for land or existing buildings; improvements of grounds; construction of buildings; additions to buildings; remodeling of buildings; initial equipment; additional equipment; and replacement of equipment.
600	Other Objects	Amounts paid for goods and services not otherwise classified above. This includes expenditures for the retirement of debt, the payment of interest on debt, payments to a housing authority, and the payment of dues and fees.
700	Transfers	This object category does not represent a purchase; rather it is used as an accounting entity to show that funds have been handled without having goods and services rendered in return.
800	Other Uses of Funds	Amounts set aside for operating contingencies for expenditures which cannot be foreseen and planned in the budget because of the occurrence of some unusual or extraordinary event, or reserved for next year.

All Funds

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1110 Ad Valorem Taxes Levied by District	8,420,733	8,616,900		9,040,376		9,361,045		
1190 Penalties and Interest on Taxes	20,563	20,733		14,659		20,000		
1500 Earnings on Investments	237,707	365,476		218,000		318,000		
1910 Rentals	-	4,590		-		5,000		
1920 Contributions, Donations, and General Fundraising from Private Sources	205,427	81,228		481,000		625,200		
1940 Services Provided to Other Local Education Agencies	4,046,964	4,140,578		5,699,514		6,816,349		
1960 Recovery of Prior Years' Expenditure	-	11,625		-		137,783		
1970 Services Provided Other Funds	1,117,099	1,143,847		1,107,755		1,149,006		
1980 Fees Charged to Grants	940,066	812,985		600,000		700,000		
1990 Miscellaneous	547,514	488,296		421,000		404,500		
Total Revenue from Local Sources	15,536,073	15,686,258		17,582,304		19,536,883		
2000 - Revenue from Intermediate Sources								
2199 Other Intermediate Sources	-	-		-		10,000		
Total Revenue from Intermediate Sources	-	-		-		10,000		
3000 - Revenue from State Sources								
3101 State School Fund - General Support	15,420,256	16,091,917		16,290,313		18,704,394		
3104 State Managed County Timber	96,609	61,506		70,000		25,000		
3299 Other Unrestricted Grants-in-aid	26,238,534	21,354,968		26,629,500		28,486,998		
Total Revenue from State Sources	41,755,400	37,508,391		42,989,813		47,216,392		
4000 - Revenue from Federal Sources								
4300 Restricted Revenue Direct from the Federal Government	4,160	249,201		110,000		-		
4500 Restricted Revenue From the Federal Government Through the State	7,583,177	7,902,957		8,701,000		8,360,500		
4700 Grants-In-Aid From the Federal Government Through Other Intermediate Agencies	82,042	150,644		100,000		95,000		
4900 Revenue for/on Behalf of the District	3,663	-		5,000		-		
Total Revenue from Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 - Revenue from Other Sources								
5100 Long Term Debt Financing Sources	-	342,174		-		-		
5200 Interfund Transfers	459,000	448,198		451,500		452,500		
5300 Sale of/or Compensation for Loss of Fixed Assets	4,092	-		-		-		
5400 Beginning Fund Balance	6,042,341	5,133,807		3,035,743		3,697,436		
Total Revenue from Other Sources	6,505,433	5,924,179		3,487,243		4,149,936		
TOTAL RESOURCES	71,469,947	67,421,631		73,475,360		79,368,711		

All Funds

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	6,007,732	6,540,440	83.81	6,557,695	94.60	7,787,023		
112 Classified Salaries	6,096,238	7,558,932	182.26	7,950,953	179.06	8,170,577		
113 Administrators	2,010,672	2,633,417	18.00	2,651,192	16.00	2,526,662		
114 Managerial - Classified	416,147	549,883	7.01	547,302	5.00	429,387		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	623,896	482,531	0.30	289,633	-	230,000		
124 Temporary - Classified	231,984	92,859	-	150,000	-	135,000		
130 Additional Salary	14,180	33,473	-	177,334	-	368,648		
Total Salaries	15,406,326	17,948,410	291.38	18,324,109	294.66	19,647,297		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	4,056,412	4,965,800		5,567,112		7,126,320		
220 Social Security Administration	1,159,009	1,339,036		1,602,951		1,501,751		
230 Other Required Payroll Costs	274,043	201,935		239,376		318,196		
240 Contractual Employee Benefits	3,609,563	3,875,832		4,196,445		4,149,463		
Total Associated Payroll Costs	9,099,027	10,382,603		11,605,884		13,095,730		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	6,735,588	5,680,599		6,293,788		9,325,703		
320 Property Services	1,242,086	608,937		578,700		692,100		
330 Student Transportation Services	34,948	88,103		-		-		
340 Travel	484,306	293,274		235,800		254,350		
350 Communication	661,600	601,228		475,550		514,850		
374 Other Tuition	380,804	193,599		425,000		292,721		
380 Non-Instructional Professional and Technical Services	2,408,187	1,638,407		1,460,654		1,475,898		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
Total Purchased Services	11,950,565	9,107,791		9,471,492		12,560,621		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	751,872	771,267		1,310,467		674,901		
420 Textbooks	85,211	29,294		44,100		10,000		
430 Library Books	11,299	-		-		-		
440 Periodicals	-	412		-		500		
450 Food	3,663	-		5,000		-		
460 Non-Consumable Items	425,024	295,165		347,627		146,200		
470 Computer Software	597,930	521,363		553,075		539,331		
480 Computer Hardware	337,227	251,658		368,903		339,500		
Total Supplies and Materials	2,212,226	1,869,159		2,629,172		1,710,431		
500 - Capital Outlay								
540 Depreciable Equipment	231,868	431,490		413,940		200,020		
550 Depreciable Technology	-	654,615		205,000		280,000		
590 Other Capital Outlay	698,330	997,618		-		179,161		
Total Capital Outlay	930,199	2,083,723		618,940		659,181		
600 - Other Objects								
610 Redemption of Principal	655,682	732,190		848,164		943,068		
621 Regular Interest	261,951	226,880		204,747		158,452		

All Funds

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
640 Dues and Fees	95,923	123,054		96,330		141,255		
650 Insurance and Judgements	247,269	170,132		192,500		218,000		
690 Grant Indirect Charges	940,066	812,985		1,065,870		739,556		
Total Other Objects	2,200,890	2,065,242	-	2,407,611	-	2,200,331		
700 - Transfers								
710 Fund Modifications	459,000	448,198		451,500		452,500		
720 Transits	24,141,710	20,037,073		25,400,811		26,559,167		
Total Transfers	24,600,710	20,485,271		25,852,311		27,011,667		
800 - Other Uses of Funds								
810 Planned Reserve	-	-		1,265,842		650,000		
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Other Uses of Funds	-	-		2,065,842		2,483,453		
TOTAL REQUIREMENTS	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		

All Funds

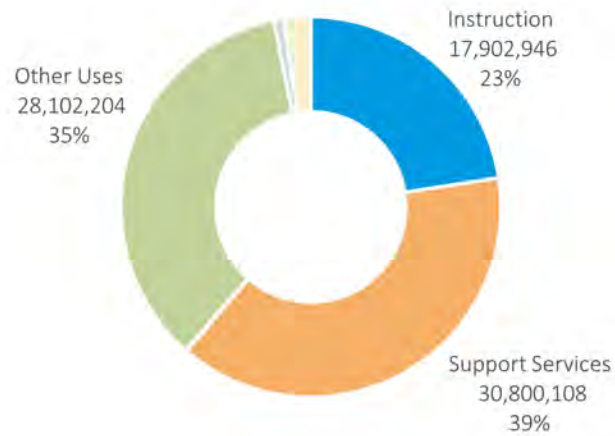
Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1111 Elementary, K-5 or K-6	-	37,211	-	-	-	-	-	-
1121 Middle/Junior High School Programs	-	2,161	-	-	-	-	-	-
1140 Pre-Kindergarten Programs	767	-	-	-	-	-	-	-
1220 Restrictive Programs for Students with Disabilities	12,201,038	13,388,706	162.47	14,353,022	159.39	15,237,408		
1250 Less Restrictive Programs For Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 Alternative Education	-	6,261	2.00	162,500	2.00	303,990		
1293 Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1299 Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
1400 Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	14,851,095	16,171,700	176.52	16,545,516	174.54	17,902,946		
2000 - Support Services								
2110 Attendance and Social Work Services	892,939	818,988	7.55	872,791	4.61	532,772		
2120 Guidance Services	995,628	1,107,331	1.70	411,664	2.00	409,229		
2130 Health Services	59,376	78,655	0.63	143,388	2.80	450,432		
2140 Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 Speech Pathology and Audiology Services	1,010,253	1,191,852	8.20	1,397,368	15.80	2,326,529		
2160 Other Student Treatment Services	-	-	-	-	-	550,000		
2190 Service Direction, Student Support Services	1,804,071	1,794,507	10.31	2,080,336	9.05	1,895,318		
2210 Improvement of Instruction Services	6,111,254	5,455,652	23.73	6,770,259	21.53	8,152,331		
2220 Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		
2240 Instructional Staff Development	3,820,807	3,522,642	9.43	4,301,214	8.75	3,617,434		
2310 Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 Operation and Maintenance of Plant Services	2,577,921	2,497,617	3.70	1,491,951	3.50	1,412,564		
2550 Student Transportation Services	5,729	-	-	-	-	-		
2570 Internal Services	115,278	63,615	1.00	82,447	0.80	79,200		
2620 Planning, Research, Development,	41,658	125	-	-	-	-		
2630 Information Services	188	1,002	-	-	-	-		
2640 Staff Services	855,885	824,164	3.50	784,023	4.09	891,824		
2660 Technology Services	1,873,184	2,693,300	9.00	2,494,363	8.50	2,774,016		
2680 Interpretation and Translation Services	3,987,618	4,395,194	28.44	4,665,000	28.40	5,340,000		
2690 Other Support Services - Central	34,142	28,130	-	20,251	-	13,100		
2700 Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	25,967,050	26,277,178	114.86	27,383,780	120.13	30,800,108		
3000 - Enterprise and Community Services								
3100 Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5000 - Other Uses								
5100 Debt Service	917,632	948,088	-	1,052,911	-	1,090,537		
5200 Transfers of Funds	459,000	448,198	-	451,500	-	452,500		
5300 Apportionment of Funds by ESD	24,141,710	20,037,073	-	25,400,811	-	26,559,167		
Total Other Uses	25,518,342	21,433,359	-	26,905,222	-	28,102,204		

All Funds

Requirements by Function (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
6000 - Contingencies								
6000 Operating Contingency	-	-		1,265,842		650,000		
Total Contingencies	-	-		1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
7000 Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
Total Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
TOTAL REQUIREMENTS	66,399,942	63,942,199	291.38	72,975,360	294.66	79,368,711		



Functions - Chart of Account Definitions

Budget requirements are prepared by program. Programs are groups of activities to accomplish a major service or function. Schools use programs in budgeting – called “functions”. The function describes the activity for which a service or material object is acquired.

FUNCTION TYPE		FUNCTION DESCRIPTION
1000	Instruction	Activities dealing directly with the teaching of students, or the interaction between teacher and students. Teaching may be provided for students in a school classroom, in another location such as a home or hospital, or in other learning situations such as those involving co-curricular activities.
2000	Support Services	Support services are those services which provide administrative, technical, personal (such as guidance and health), and logistical support to facilitate and enhance instruction.
3000	Enterprise and Community Services	Activities concerned with operations that are financed and operated in a manner similar to private business enterprises where the stated intent is that the costs of providing goods and services to the students or general public are financed or recovered primarily through user charges and community programs.
5000	Other Uses	Activities included in this category are servicing the debt of a district, conduit-type transfers from one fund to another fund and apportionment of funds by Education Service District (ESD).
6000	Contingency	Expenditures which cannot be foreseen and planned in the budget process because of an occurrence of an unusual or extraordinary event.
7000	Unappropriated Ending Fund Balance	An estimate of funds needed to maintain operations of the school district from July 1 of the ensuing fiscal year and the time when sufficient new revenues become available to meet cash flow needs of the fund. No expenditure shall be made from the unappropriated ending fund balance in the year in which it is budgeted.

General Fund

The General Fund is the main operating fund of the ESD and accounts for all financial resources of the district except those required to be accounted for in another fund.



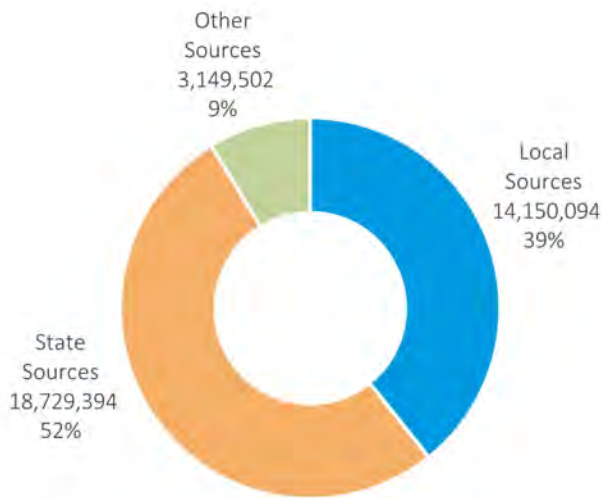
Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

General Fund

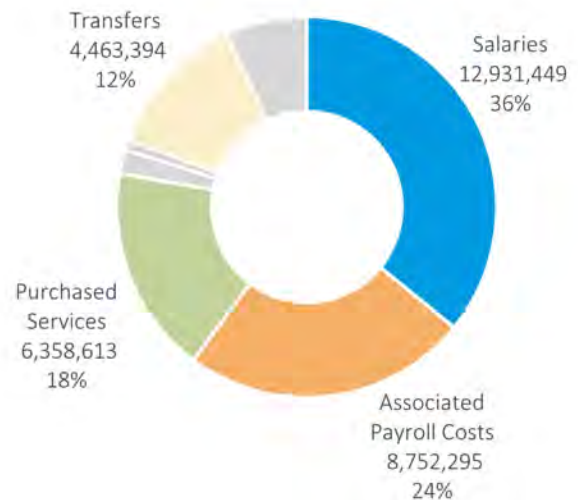
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	11,319,810	11,334,861		12,394,549		14,150,094		
2000 Intermediate Sources	-	-		-		10,000		
3000 State Sources	15,516,866	16,153,423		16,360,313		18,729,394		
5000 Other Sources	4,396,659	3,288,814		2,618,617		3,149,502		
Total Resources	31,233,335	30,777,098		31,373,479		36,038,990		
Requirements								
100 Salaries	9,141,836	10,973,743	205.95	11,436,471	215.29	12,931,449		
200 Associated Payroll Costs	5,738,735	6,470,402		7,495,703		8,752,295		
300 Purchased Services	6,815,071	5,713,478		5,695,892		6,358,613		
400 Supplies and Materials	763,976	599,614		662,884		724,853		
600 Other Objects	312,523	263,685		269,700		324,933		
700 Transfers	5,214,555	4,046,197		3,746,987		4,463,394		
800 Other Uses of Funds	-	-		2,065,842		2,483,453		
Total Requirements	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		
ENDING FUND BALANCE	3,246,640	2,709,979						

Resources



Requirements



General Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1110 Ad Valorem Taxes Levied by District	8,420,733	8,616,900		9,040,376		9,361,045		
1190 Penalties and Interest on Taxes	20,563	20,733		14,659		20,000		
1500 Earnings on Investments	222,443	340,150		200,000		300,000		
1910 Rentals	-	4,590		-		5,000		
1920 Contributions, Donations, and General Fundraising from Private Sources	55	218		-		200		
1940 Services Provided to Other Local Education Agencies	1,376,808	1,256,511		2,209,514		3,441,349		
1960 Recovery of Prior Years' Expenditure	-	-		-		5,000		
1980 Fees Charged to Grants	940,066	812,985		600,000		700,000		
1990 Miscellaneous	339,143	282,773		330,000		317,500		
Total Revenue from Local Sources	11,319,810	11,334,861		12,394,549		14,150,094		
2000 - Revenue from Intermediate Sources								
2199 Other Intermediate Sources	-	-		-		10,000		
Total Revenue from Intermediate Sources	-	-		-		10,000		
3000 - Revenue from State Sources								
3101 State School Fund - General Support	15,420,256	16,091,917		16,290,313		18,704,394		
3104 State Managed County Timber	96,609	61,506		70,000		25,000		
3199 Other Unrestricted Grants-in-aid	-	-		-		-		
Total Revenue from State Sources	15,516,866	16,153,423		16,360,313		18,729,394		
5000 - Revenue from Other Sources								
5100 Long Term Debt Financing Sources	-	42,174		-		-		
5400 Beginning Fund Balance	4,396,659	3,246,640		2,618,617		3,149,502		
Total Revenue from Other Sources	4,396,659	3,288,814		2,618,617		3,149,502		
TOTAL RESOURCES	31,233,335	30,777,098		31,373,479		36,038,990		

General Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	3,321,324	3,759,536	51.58	3,704,207	64.00	4,934,272		
112 Classified Salaries	3,885,363	4,817,099	135.04	5,185,211	134.99	5,476,629		
113 Administrators	1,502,582	1,785,700	12.85	1,933,580	11.40	1,819,319		
114 Managerial - Classified	351,127	486,122	6.48	508,123	4.90	421,316		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	13,763	24,667	-	-	-	30,000		
124 Temporary - Classified	53,219	21,721	-	-	-	35,000		
130 Additional Salary	8,980	22,023	-	105,350	-	214,913		
Total Salaries	9,141,836	10,973,743	205.95	11,436,471	215.29	12,931,449		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	2,393,719	2,953,487		3,461,964		4,668,744		
220 Social Security Administration	684,907	814,391		998,495		987,989		
230 Other Required Payroll Costs	161,253	119,934		157,692		216,570		
240 Contractual Employee Benefits	2,498,856	2,582,590		2,877,552		2,878,992		
Total Associated Payroll Costs	5,738,735	6,470,402		7,495,703		8,752,295		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	4,497,034	3,984,236		4,020,788		4,584,060		
320 Property Services	1,036,274	524,734		531,400		611,100		
330 Student Transportation Services	-	67		-		-		
340 Travel	144,828	64,981		44,400		78,000		
350 Communication	385,580	472,858		420,750		466,705		
380 Non-Instructional Professional and Technical Services	748,307	662,958		676,554		613,748		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
Total Purchased Services	6,815,071	5,713,478		5,695,892		6,358,613		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	185,279	192,784		203,025		226,332		
420 Textbooks	22,181	17,442		21,000		-		
430 Library Books	80	-		-		-		
440 Periodicals	-	387		-		500		
460 Non-Consumable Items	256,494	126,648		121,784		87,200		
470 Computer Software	242,929	231,192		274,075		401,321		
480 Computer Hardware	57,013	31,161		43,000		9,500		
Total Supplies and Materials	763,976	599,614		662,884		724,853		
600 - Other Objects								
610 Redemption of Principal	-	10,113		-		10,684		
621 Regular Interest	-	870		-		299		
640 Dues and Fees	65,254	82,570		77,200		95,950		
650 Insurance and Judgements	247,269	170,132		192,500		218,000		
Total Other Objects	312,523	263,685		269,700		324,933		

General Fund

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
700 - Transfers								
710 Fund Modifications	459,000	448,198		449,000		452,500		
720 Transits	4,755,555	3,597,999		3,297,987		4,010,894		
Total Transfers	5,214,555	4,046,197		3,746,987		4,463,394		
800 - Other Uses of Funds								
810 Planned Reserve	-	-		1,265,842		650,000		
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Other Uses of Funds	-	-		2,065,842		2,483,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1220 Restrictive Programs for Students with Disabilities	11,714,304	12,892,130	159.07	13,256,808	153.29	13,820,334		
1280 Alternative Education	-	-	-	-	2.00	303,990		
1299 Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
Total Instruction	11,753,937	12,919,442	159.37	13,292,681	155.59	14,163,749		
2000 - Support Services								
2110 Attendance and Social Work Services	11,827	4,208	0.05	5,541	-	-		
2120 Guidance Services	98,355	77,951	-	86,604	0.50	166,661		
2130 Health Services	38,285	24,425	0.63	88,388	2.80	397,432		
2140 Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 Speech Pathology and Audiology Services	1,002,979	1,191,852	8.20	1,394,368	15.30	2,246,237		
2160 Other Student Treatment Services	-	-	-	-	-	550,000		
2190 Service Direction, Student Support Services	1,675,114	1,615,888	9.73	1,901,088	7.75	1,548,811		
2210 Improvement of Instruction Services	761,484	869,617	4.10	907,167	6.16	1,281,878		
2220 Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		
2240 Instructional Staff Development	239,202	113,348	-	572,843	-	78,000		
2310 Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 Operation and Maintenance of Plant Services	1,539,775	1,004,847	3.70	1,068,011	3.50	1,023,383		
2570 Internal Services	71,123	63,615	1.00	82,447	0.80	79,200		
2630 Information Services	188	1,002	-	-	-	-		
2640 Staff Services	684,499	806,239	3.50	709,709	4.09	844,319		
2660 Technology Services	1,417,506	1,709,135	8.00	1,857,827	8.50	2,124,016		
2680 Interpretation and Translation Services	1,662,604	1,798,500	-	1,705,000	-	2,220,000		
2690 Other Support Services - Central	34,142	16,451	-	20,251	-	13,100		
2700 Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	11,018,203	11,101,481	46.58	12,267,969	59.70	14,928,394		
5000 - Other Uses								
5200 Transfers of Funds	459,000	448,198	-	449,000	-	452,500		
5300 Apportionment of Funds by ESD	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Total Other Uses	5,214,555	4,046,197		3,746,987		4,463,394		
6000 - Contingencies								
6000 Operating Contingency	-	-	-	1,265,842	-	650,000		
Total Contingencies	-	-		1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
7000 Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
Total Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Function / Object

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
1220 - Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	2,666,008	2,899,139	40.13	2,861,425	37.60	2,727,045		
112 Classified Salaries	2,832,375	3,789,144	118.94	4,051,233	115.69	4,116,469		
121 Substitutes - Licensed	4,875	8,589	-	-	-	-		
122 Substitutes - Classified	603	48,285	-	-	-	-		
123 Temporary - Licensed	-	23,767	-	-	-	10,000		
124 Temporary - Classified	7,352	5,829	-	-	-	35,000		
130 Additional Salary	3,900	4,713	-	77,990	-	153,038		
210 Public Employees Retirement System	1,414,099	1,787,564	-	2,097,916	-	2,528,428		
220 Social Security Administration	414,652	502,301	-	619,768	-	538,679		
230 Other Required Payroll Costs	78,637	54,360	-	83,572	-	84,188		
240 Contractual Employee Benefits	1,793,492	1,788,972	-	1,975,153	-	1,820,694		
310 Instructional, Professional and Technical Services	2,025,534	1,549,667	-	1,078,700	-	1,372,595		
320 Property Services	127,761	88,849	-	85,700	-	152,800		
330 Student Transportation Services	-	67	-	-	-	-		
340 Travel	9,097	4,342	-	3,900	-	8,350		
350 Communication	32,702	85,236	-	73,750	-	43,200		
380 Non-Instructional Professional and Technical Services	17,619	2,249	-	1,000	-	12,100		
410 Consumable Supplies and Materials	65,600	90,485	-	96,100	-	88,499		
420 Textbooks	17,914	17,377	-	21,000	-	-		
430 Library Books	80	-	-	-	-	-		
460 Non-Consumable Items	97,416	52,492	-	47,000	-	45,000		
470 Computer Software	59,556	66,726	-	61,500	-	79,250		
480 Computer Hardware	42,161	21,215	-	20,000	-	5,000		
640 Dues and Fees	2,873	762	-	1,100	-	-		
Total Restrictive Programs for Students with Disabilities	11,714,304	12,892,130	159.07	13,256,808	153.29	13,820,334		
1280 - Alternative Education								
111 Licensed Salaries	-	-	-	-	1.00	74,308		
112 Classified Salaries	-	-	-	-	1.00	41,516		
210 Public Employees Retirement System	-	-	-	-	-	41,442		
220 Social Security Administration	-	-	-	-	-	8,861		
230 Other Required Payroll Costs	-	-	-	-	-	1,373		
240 Contractual Employee Benefits	-	-	-	-	-	16,913		
310 Instructional, Professional and Technical Services	-	-	-	-	-	83,527		
320 Property Services	-	-	-	-	-	4,000		
340 Travel	-	-	-	-	-	1,000		
350 Communication	-	-	-	-	-	4,050		
410 Consumable Supplies and Materials	-	-	-	-	-	23,501		
460 Non-Consumable Items	-	-	-	-	-	1,000		
470 Computer Software	-	-	-	-	-	2,500		
Total Alternative Education	-	-	-	-	2.00	303,990		
1299 - Other Programs								
112 Classified Salaries	18,623	13,945	0.30	20,099	0.30	20,804		
124 Temporary - Classified	3,331	587	-	-	-	-		
210 Public Employees Retirement System	6,853	4,349	-	5,973	-	7,444		
220 Social Security Administration	1,644	1,095	-	1,538	-	1,592		
230 Other Required Payroll Costs	219	172	-	239	-	247		
240 Contractual Employee Benefits	2,736	1,859	-	2,550	-	2,538		
320 Property Services	129	178	-	200	-	200		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
350 Communication	2,488	2,410		2,500		3,100		
380 Non-Instructional Professional and Technical Services	765	-		-		-		
410 Consumable Supplies and Materials	269	141		200		500		
470 Computer Software	2,576	2,575		2,575		3,000		
Total Other Programs	39,633	27,312	0.30	35,874	0.30	39,424		
Total Instruction	11,753,937	12,919,442	159.37	13,292,681	155.59	14,163,749		
2110 - Attendance and Social Work Services								
112 Classified Salaries	5,924	2,254	0.05	3,350	-	-		
124 Temporary - Classified	1,221	65	-	-	-	-		
210 Public Employees Retirement System	2,087	691	-	996	-	-		
220 Social Security Administration	541	175	-	256	-	-		
230 Other Required Payroll Costs	75	28	-	40	-	-		
240 Contractual Employee Benefits	391	304	-	425	-	-		
320 Property Services	13	25	-	-	-	-		
340 Travel	91	-	-	-	-	-		
350 Communication	924	610	-	375	-	-		
380 Non-Instructional Professional and Technical Services	450	-	-	-	-	-		
470 Computer Software	110	56	-	100	-	-		
Total Attendance and Social Work Services	11,827	4,208	0.05	5,541	-	-		
2120 - Guidance Services								
111 Licensed Salaries	-	-	-	-	0.50	47,041		
112 Classified Salaries	9,709	10,317	-	-	-	16,831		
210 Public Employees Retirement System	2,719	3,031	-	-	-	3,599		
220 Social Security Administration	737	757	-	-	-	552		
230 Other Required Payroll Costs	159	120	-	-	-	9,190		
240 Contractual Employee Benefits	2,598	2,898	-	-	-	500		
380 Non-Instructional Professional and Technical Services	82,433	60,827	-	86,604	-	86,948		
410 Consumable Supplies and Materials	-	-	-	-	-	500		
470 Computer Software	-	-	-	-	-	500		
640 Dues and Fees	-	-	-	-	-	1,000		
Total Guidance Services	98,355	77,951	-	86,604	0.50	166,661		
2130 - Health Services								
111 Licensed Salaries	10,064	16,506	0.63	48,628	2.80	230,140		
130 Additional Salary	-	1,511	-	-	-	6,000		
210 Public Employees Retirement System	2,328	880	-	15,833	-	84,491		
220 Social Security Administration	749	1,340	-	5,104	-	18,065		
230 Other Required Payroll Costs	80	208	-	572	-	2,790		
240 Contractual Employee Benefits	1,192	3,393	-	18,251	-	26,890		
310 Instructional, Professional and Technical Services	21,585	279	-	-	-	19,507		
340 Travel	-	-	-	-	-	700		
350 Communication	-	120	-	-	-	3,700		
410 Consumable Supplies and Materials	-	-	-	-	-	900		
470 Computer Software	-	50	-	-	-	750		
480 Computer Hardware	2,288	140	-	-	-	-		
640 Dues and Fees	-	-	-	-	-	3,500		
Total Health Services	38,285	24,425	0.63	88,388	2.80	397,432		
2140 - Psychological Services								
111 Licensed Salaries	69,433	71,687	0.63	55,285	2.80	251,005		

General Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
130 Additional Salary	-	-		564		-		
210 Public Employees Retirement System	20,506	21,421		17,515		91,654		
220 Social Security Administration	5,046	5,484		4,272		19,202		
230 Other Required Payroll Costs	692	840		657		2,944		
240 Contractual Employee Benefits	16,139	9,390		9,631		54,238		
310 Instructional, Professional and Technical Services	146,761	144,000		150,000		46,351		
320 Property Services	356	533		500		-		
350 Communication	2,462	2,728		1,000		9,000		
410 Consumable Supplies and Materials	394	113		2,000		9,000		
420 Textbooks	1,252	-		-		-		
470 Computer Software	1,036	641		-		2,700		
640 Dues and Fees	77	-		1,000		-		
Total Psychological Services	264,153	256,837	0.63	242,425	2.80	486,093		
2150 - Speech Pathology and Audiology Services								
111 Licensed Salaries	487,620	610,593	8.20	604,426	15.30	1,273,933		
130 Additional Salary	4,600	4,400		17,196		6,000		
210 Public Employees Retirement System	142,499	173,430		189,427		461,107		
220 Social Security Administration	36,349	45,680		52,299		97,915		
230 Other Required Payroll Costs	5,276	7,383		7,364		15,049		
240 Contractual Employee Benefits	85,432	104,455		123,256		264,770		
310 Instructional, Professional and Technical Services	190,215	182,508		370,000		76,487		
320 Property Services	3,660	6,282		6,500		-		
340 Travel	6,078	2,216		2,100		6,600		
350 Communication	4,633	7,870		4,900		9,100		
380 Non-Instructional Professional and Technical Services	-	811		-		250		
410 Consumable Supplies and Materials	2,294	4,771		3,800		6,000		
420 Textbooks	1,707	65		-		-		
460 Non-Consumable Items	7,335	28,148		100		1,000		
470 Computer Software	24,989	11,162		8,000		28,025		
480 Computer Hardware	-	2,077		5,000		-		
640 Dues and Fees	294	-		-		-		
Total Speech Pathology and Audiology Services	1,002,979	1,191,852	8.20	1,394,368	15.30	2,246,237		
2160 - Other Student Treatment Services								
310 Instructional, Professional and Technical Services	-	-		-		550,000		
Total Other Student Treatment Services	-	-	-	-	-	550,000		
2190 - Service Direction, Student Support Services								
112 Classified Salaries	93,806	115,317	2.50	121,269	2.25	102,429		
113 Administrators	780,241	813,657	6.25	899,747	4.60	696,771		
114 Managerial - Classified	71,357	53,499	0.98	72,760	0.90	72,642		
123 Temporary - Licensed	-	900	-	-	-	20,000		
124 Temporary - Classified	-	634	-	-	-	-		
130 Additional Salary	-	-		-		6,000		
210 Public Employees Retirement System	247,540	234,559		335,467		319,347		
220 Social Security Administration	70,345	73,594		99,387		68,685		
230 Other Required Payroll Costs	10,226	841		12,837		10,592		
240 Contractual Employee Benefits	203,407	195,892		257,107		196,196		
310 Instructional, Professional and Technical Services	21,334	34,523		26,250		-		
320 Property Services	39,153	41,687		47,300		25,700		

General Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
340 Travel	9,486	3,719		3,700		3,650		
350 Communication	9,806	13,317		6,600		11,500		
380 Non-Instructional Professional and Technical Services	7,326	1,295		2,200		1,500		
410 Consumable Supplies and Materials	12,773	11,139		5,464		3,801		
420 Textbooks	1,307	-		-		500		
460 Non-Consumable Items	45,123	4,566		1,000		500		
470 Computer Software	48,935	10,144		6,000		4,750		
480 Computer Hardware	2,219	1,250		-		-		
640 Dues and Fees	730	-		4,000		4,250		
650 Insurance and Judgements	-	5,355		-		-		
Total Service Direction, Student Support Services	1,675,114	1,615,888	9.73	1,901,088	7.75	1,548,811		
2210 - Improvement of Instruction Services								
111 Licensed Salaries	41,775	120,429	1.00	78,925	3.00	269,125		
112 Classified Salaries	174,750	83,452	1.00	58,760	1.86	121,987		
113 Administrators	15,808	150,598	1.60	246,445	1.30	215,682		
114 Managerial - Classified	-	-	0.50	37,313	-	-		
123 Temporary - Licensed	2,600	-	-	-	-	-		
124 Temporary - Classified	584	-	-	-	-	-		
130 Additional Salary	-	-	-	1,800	-	9,638		
210 Public Employees Retirement System	69,089	107,910	-	131,955	-	230,071		
220 Social Security Administration	17,903	26,524	-	34,414	-	46,982		
230 Other Required Payroll Costs	2,239	4,109	-	4,987	-	7,277		
240 Contractual Employee Benefits	38,138	76,732	-	80,330	-	99,467		
310 Instructional, Professional and Technical Services	143,755	160,276	-	105,795	-	110,644		
320 Property Services	3,590	3,173	-	3,300	-	7,200		
340 Travel	9,952	217	-	3,550	-	-		
350 Communication	6,281	5,860	-	7,050	-	7,000		
380 Non-Instructional Professional and Technical Services	111,486	115,354	-	95,000	-	141,300		
410 Consumable Supplies and Materials	17,151	4,077	-	7,044	-	5,004		
460 Non-Consumable Items	999	100	-	2,000	-	-		
470 Computer Software	17,471	7,278	-	7,000	-	10,500		
480 Computer Hardware	348	3,401	-	1,000	-	-		
640 Dues and Fees	1,417	127	-	500	-	-		
650 Insurance and Judgements	86,148	-	-	-	-	-		
Total Improvement of Instruction Services	761,484	869,617	4.10	907,167	6.16	1,281,878		
2220 - Educational Media Services								
111 Licensed Salaries	46,424	41,182	1.00	55,519	1.00	61,675		
210 Public Employees Retirement System	11,057	11,270	-	16,500	-	22,067		
220 Social Security Administration	3,446	2,659	-	4,247	-	4,718		
230 Other Required Payroll Costs	485	441	-	658	-	729		
240 Contractual Employee Benefits	12,657	12,821	-	16,076	-	16,282		
310 Instructional, Professional and Technical Services	-	1,114	-	-	-	13,464		
320 Property Services	222	254	-	300	-	700		
340 Travel	1,432	3,136	-	1,200	-	3,000		
350 Communication	-	98	-	120	-	200		
440 Periodicals	-	137	-	-	-	-		
460 Non-Consumable Items	-	13	-	-	-	-		
470 Computer Software	12,923	14,048	-	15,000	-	500		
640 Dues and Fees	-	35	-	-	-	-		
Total Educational Media Services	88,647	87,208	1.00	109,620	1.00	124,135		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2240 - Instructional Staff Development								
130 Additional Salary	-	10,800		-		-		
210 Public Employees Retirement System	-	3,147		-		-		
220 Social Security Administration	-	801		-		-		
230 Other Required Payroll Costs	-	127		-		-		
310 Instructional, Professional and Technical Services	239,202	97,872		570,343		70,500		
340 Travel	-	-		-		7,500		
380 Non-Instructional Professional and Technical Services	-	600		-		-		
410 Consumable Supplies and Materials	-	-		2,500		-		
Total Instructional Staff Development	239,202	113,348	-	572,843	-	78,000		
2310 - Board of Education Services								
340 Travel	42,650	22,766		10,200		23,000		
350 Communication	140	264		325		325		
380 Non-Instructional Professional and Technical Services	203,689	219,537		269,500		155,000		
410 Consumable Supplies and Materials	4,921	8,024		4,500		5,000		
470 Computer Software	-	331		100		500		
640 Dues and Fees	27,038	47,874		50,000		60,000		
650 Insurance and Judgements	85,205	92,642		102,500		128,000		
Total Board of Education Services	363,643	391,437	-	437,125	-	371,825		
2320 - Executive Administration Services								
112 Classified Salaries	4,968	434	0.25	16,749	-	-		
113 Administrators	168,618	183,397	1.00	185,016	1.50	282,359		
114 Managerial - Classified	65,792	69,181	0.80	72,190	1.00	93,396		
123 Temporary - Licensed	11,163	-	-	-	-	-		
124 Temporary - Classified	-	3,936	-	-	-	-		
130 Additional Salary	480	600		600		3,600		
210 Public Employees Retirement System	77,695	73,527		77,783		136,271		
220 Social Security Administration	18,088	18,646		21,942		27,928		
230 Other Required Payroll Costs	2,425	2,782		3,238		4,469		
240 Contractual Employee Benefits	54,902	66,158		63,268		85,282		
310 Instructional, Professional and Technical Services	25,324	-		-		-		
320 Property Services	800	965		1,000		2,900		
340 Travel	11,509	16,505		7,250		10,000		
350 Communication	2,403	1,513		1,230		1,430		
380 Non-Instructional Professional and Technical Services	18,411	6,318		6,500		11,000		
410 Consumable Supplies and Materials	13,955	17,191		14,000		14,000		
460 Non-Consumable Items	261	1,762		1,000		4,000		
470 Computer Software	2,753	2,597		3,500		1,500		
640 Dues and Fees	7,612	6,417		6,300		6,000		
650 Insurance and Judgements	18,000	-		-		-		
Total Executive Administration Services	505,157	471,928	2.05	481,566	2.50	684,136		
2520 - Fiscal Services								
112 Classified Salaries	105,312	113,287	2.00	122,866	2.00	142,889		
113 Administrators	147,408	185,078	1.00	161,743	1.00	165,447		
114 Managerial - Classified	67,875	73,939	1.00	73,697	1.00	76,276		
124 Temporary - Classified	19,159	-	-	-	-	-		
130 Additional Salary	-	-		7,200		12,000		
210 Public Employees Retirement System	100,245	116,909		115,145		147,360		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
220 Social Security Administration	25,332	26,964		27,961		30,341		
230 Other Required Payroll Costs	3,292	3,957		4,355		4,714		
240 Contractual Employee Benefits	47,178	36,714		31,223		36,927		
310 Instructional, Professional and Technical Services	2,072	-		1,000		2,650		
320 Property Services	2,089	2,028		2,100		3,500		
340 Travel	9	1,851		2,000		3,000		
350 Communication	4,232	4,265		5,300		4,800		
380 Non-Instructional Professional and Technical Services	13,019	1,615		5,750		-		
410 Consumable Supplies and Materials	3,519	2,551		5,620		2,015		
460 Non-Consumable Items	119	389		1,000		500		
470 Computer Software	1,087	15,577		16,000		41,630		
640 Dues and Fees	5,722	6,489		6,000		6,000		
Total Fiscal Services	547,669	591,614	4.00	588,960	4.00	680,049		
2540 - Operation and Maintenance of Plant Services								
112 Classified Salaries	116,255	121,326	2.50	119,631	2.50	130,291		
113 Administrators	109,261	119,524	1.00	130,125	1.00	132,985		
114 Managerial - Classified	16,448	17,295	0.20	18,048	-	-		
124 Temporary - Classified	-	5,919	-	-	-	-		
210 Public Employees Retirement System	68,502	77,561		80,104		94,200		
220 Social Security Administration	19,082	20,793		22,267		20,141		
230 Other Required Payroll Costs	30,875	15,169		9,171		9,648		
240 Contractual Employee Benefits	48,122	55,291		57,533		53,068		
310 Instructional, Professional and Technical Services	-	965		-		400		
320 Property Services	758,484	274,060		332,400		344,900		
340 Travel	-	12		400		500		
350 Communication	8,104	8,298		9,700		8,150		
380 Non-Instructional Professional and Technical Services	184,937	146,852		100,000		61,400		
410 Consumable Supplies and Materials	37,640	36,887		45,348		53,500		
460 Non-Consumable Items	80,271	26,255		51,984		22,500		
470 Computer Software	3,448	1,091		1,000		1,000		
640 Dues and Fees	430	59		300		700		
650 Insurance and Judgements	57,916	77,490		90,000		90,000		
Total Operation and Maintenance of Plant Services	1,539,775	1,004,847	3.70	1,068,011	3.50	1,023,383		
2570 - Internal Services								
112 Classified Salaries	32,184	33,844	1.00	45,377	0.80	34,536		
210 Public Employees Retirement System	9,017	9,846		13,486		12,357		
220 Social Security Administration	2,462	2,589		3,471		2,642		
230 Other Required Payroll Costs	5,053	3,083		4,181		3,181		
240 Contractual Employee Benefits	7,757	7,996		8,431		8,450		
320 Property Services	10,445	2,698		3,800		10,600		
350 Communication	510	463		550		600		
410 Consumable Supplies and Materials	3,434	3,041		3,050		200		
470 Computer Software	262	56		100		200		
Total Internal Services	71,123	63,615	1.00	82,447	0.80	79,200		
2630 - Information Services								
124 Temporary - Classified	150	788	-	-	-	-		
210 Public Employees Retirement System	24	145		-		-		
220 Social Security Administration	11	60		-		-		
230 Other Required Payroll Costs	2	9		-		-		
Total Information Services	188	1,002						

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2640 - Staff Services								
112 Classified Salaries	65,130	-	0.50	30,670	2.09	114,464		
113 Administrators	140,868	181,517	1.00	152,659	1.00	160,628		
114 Managerial - Classified	77,417	197,182	2.00	153,036	1.00	91,873		
124 Temporary - Classified	21,422	3,963	-	-	-	-		
130 Additional Salary	-	-	-	-	-	12,000		
210 Public Employees Retirement System	60,846	104,945		107,587		143,623		
220 Social Security Administration	22,381	28,236		27,675		28,991		
230 Other Required Payroll Costs	8,274	14,609		16,462		54,512		
240 Contractual Employee Benefits	52,468	75,737		70,593		39,827		
310 Instructional, Professional and Technical Services	8,612	12,416		4,700		2,501		
320 Property Services	1,512	2,031		2,100		4,300		
340 Travel	48,378	3,783		1,700		3,350		
350 Communication	9,558	21,281		9,200		3,300		
380 Non-Instructional Professional and Technical Services	100,789	98,066		75,000		115,750		
390 Other General Professional and Technological Services	3,047	3,645		2,000		5,000		
410 Consumable Supplies and Materials	15,194	6,162		1,629		1,000		
440 Periodicals	-	250		-		-		
460 Non-Consumable Items	10,631	10,083		200		200		
470 Computer Software	9,281	31,826		50,000		55,000		
480 Computer Hardware	9,997	-		-		-		
640 Dues and Fees	18,694	10,506		4,500		8,000		
Total Staff Services	684,499	806,239	3.50	709,709	4.09	844,319		
2660 - Technology Services								
112 Classified Salaries	426,328	533,781	6.00	595,208	6.50	651,244		
113 Administrators	140,378	151,929	1.00	157,845	1.00	165,447		
114 Managerial - Classified	52,238	75,025	1.00	81,079	1.00	87,129		
130 Additional Salary	-	-		-		6,638		
210 Public Employees Retirement System	158,613	222,300		256,278		332,051		
220 Social Security Administration	46,138	56,692		73,893		69,650		
230 Other Required Payroll Costs	13,244	11,697		9,360		14,304		
240 Contractual Employee Benefits	120,397	138,598		154,695		139,141		
310 Instructional, Professional and Technical Services	10,038	2,116		9,000		9,000		
320 Property Services	61,729	91,302		34,100		52,200		
340 Travel	6,146	6,434		8,400		7,350		
350 Communication	301,358	318,525		297,700		355,750		
380 Non-Instructional Professional and Technical Services	7,383	9,435		35,000		26,000		
410 Consumable Supplies and Materials	4,412	2,420		4,069		4,613		
460 Non-Consumable Items	14,339	2,839		17,500		12,500		
470 Computer Software	54,455	67,034		103,200		169,016		
480 Computer Hardware	-	3,218		17,000		4,500		
610 Redemption of Principal	-	10,113		-		10,684		
621 Regular Interest	-	870		-		299		
640 Dues and Fees	309	4,809		3,500		6,500		
Total Technology Services	1,417,506	1,709,135	8.00	1,857,827	8.50	2,124,016		
2680 - Interpretation and Translation Services								
310 Instructional, Professional and Technical Services	1,662,604	1,798,500		1,705,000		2,220,000		
Total Interpretation and Translation Services	1,662,604	1,798,500		1,705,000		2,220,000		

General Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2690 - Other Support Services - Central								
320 Property Services	26,331	10,669		12,100		2,100		
350 Communication	(20)	-		450		1,000		
380 Non-Instructional Professional and Technical Services	-	-		-		2,500		
410 Consumable Supplies and Materials	3,723	5,782		7,701		7,500		
470 Computer Software	4,048	-		-		-		
640 Dues and Fees	60	-		-		-		
Total Other Support Services - Central	34,142	16,451	-	20,251	-	13,100		
2700 - Supplemental Retirement Program								
240 Contractual Employee Benefits	11,850	5,380		9,030		9,120		
Total Supplemental Retirement Program	11,850	5,380	-	9,030	-	9,120		
Total Support Services	11,018,203	11,101,481	46.58	12,267,969	59.70	14,928,394		
5200 - Transfers of Funds								
710 Fund Modifications	459,000	448,198		449,000		452,500		
Total Transfers of Funds	459,000	448,198		449,000		452,500		
5300 - Apportionment of Funds by ESD								
720 Transits	4,755,555	3,597,999		3,297,987		4,010,894		
Total Apportionment of Funds by ESD	4,755,555	3,597,999		3,297,987		4,010,894		
Total Other Uses	5,214,555	4,046,197		3,746,987		4,463,394		
6000 - Contingencies								
810 Planned Reserve	-	-		1,265,842		650,000		
Total Contingencies	-	-		1,265,842		650,000		
7000 - Unappropriated Ending Fund Balance								
820 Reserved for Next Year	-	-		800,000		1,833,453		
Total Unappropriated Ending Fund Balance	-	-		800,000		1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Service Area

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Programs for Children with Special Needs								
Innovation/Special Projects	95,589	123,540	-	165,000	-	123,923		
Life Skills Consortium Placements	11,813,475	12,491,421	148.30	13,086,144	154.57	15,306,505		
Lane School Placements	2,258,626	2,376,400	22.68	2,555,496	17.93	2,161,500		
Behavior Disorder Consultants	350,384	404,053	1.15	174,117	0.95	148,500		
School Psychologists	275,522	262,746	0.65	247,248	2.90	504,000		
Speech Language Pathologists	475,193	572,475	3.33	534,704	7.15	1,085,000		
Augmentative Communication	145,911	230,265	1.58	238,028	1.45	256,000		
Direction Service	82,433	60,827	-	86,604	-	86,948		
Nursing Services	38,285	24,425	0.63	88,388	0.85	136,000		
Other Contracted Services	1,867,278	2,076,718	2.00	1,965,647	-	2,220,000		
Total Programs for Children with Special Needs	17,402,695	18,622,870	180.31	19,141,376	185.79	22,028,376		
Technology Support								
Technology Services	1,045,796	1,222,571	4.45	1,352,591	4.50	1,487,160		
Application Hosting and Management	-	-	-	-	-	13,416		
Total Technology Support	1,045,796	1,222,571	4.45	1,352,591	4.50	1,500,576		
School Improvement Services								
School Improvement Services	330,733	407,420	2.10	571,791	4.41	900,025		
Promise Programs	80,223	82,348	0.25	73,370	0.25	81,352		
Lane Career Academy	-	-	-	-	2.00	306,490		
Career and Technical Education	184,939	188,622	1.75	192,006	1.50	224,200		
Library Services	88,647	87,208	1.00	109,620	1.00	124,135		
Professional Development	237,202	95,673	-	563,343	-	-		
Total School Improvement Services	921,744	861,271	5.10	1,510,129	9.16	1,636,202		
Administrative and Support Services								
Home Schooling	39,633	27,312	0.30	35,874	0.30	39,424		
Attendance and Truancy Services	11,827	4,208	0.05	5,541	-	-		
Connected Lane County	70,000	70,000	-	70,000	-	76,300		
Substitute List Subscription	-	-	-	-	0.09	9,266		
Courier Services	71,123	63,615	1.00	82,447	0.80	79,200		
Business Services	70,800	27,150	-	40,000	-	-		
Superintendent Services	14,963	-	-	-	-	-		
Communications Services	188	1,002	-	-	-	-		
Total Administrative and Support Services	278,534	193,286	1.35	233,861	1.19	204,190		
Administration	3,582,370	3,569,121	14.74	3,771,693	14.65	4,175,299		
Transits to Districts	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Contingencies	-	-	-	1,265,842	-	650,000		
Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	36,038,990		

General Fund

Requirements by Cost Center

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Core Services								
110 Technology Services	1,045,796	1,222,571	4.45	1,352,591	4.50	1,487,160		
224 School Improvement Services	330,733	407,420	2.10	571,791	4.41	900,025		
225 Lane Career Academy	-	-	-	-	2.00	306,490		
330 Life Skills Program	-	-	-	-	-	100,000		
510 Innovation/Special Projects	95,589	123,540	-	165,000	-	123,923		
515 Promise Programs	80,223	82,348	0.25	73,370	0.25	81,352		
520 Connected Lane County	70,000	70,000	-	70,000	-	76,300		
Total Core Services	1,622,342	1,905,878	6.80	2,232,752	11.16	3,075,250		
Menu Services								
016 Central Services	-	-	-	-	-	93,402		
017 Facilities - Westmoreland	339,089	318,629	0.75	312,320	1.35	308,726		
226 Career and Technical Education	184,939	188,622	1.75	192,006	1.50	192,766		
300 Special Education Direction	419,114	399,543	1.95	405,866	4.90	895,324		
310 School Psychologist Services	275,522	262,746	0.65	247,248	2.80	464,943		
330 Life Skills Program	10,849,473	11,208,825	139.34	11,625,849	126.88	11,931,053		
335 Intensive Services Program - Behavior	472,120	815,533	7.00	990,382	8.03	753,224		
340 Intensive Services Program - Medical	-	-	-	-	15.33	1,706,149		
360 Lane School Program	1,992,305	2,125,291	21.94	2,307,225	16.41	1,845,155		
362 Behavior Consultant Services	350,384	404,053	1.15	174,117	0.90	139,547		
380 Direction Service	82,433	60,827	-	86,604	-	86,948		
385 Augmentative Communication Services	145,911	230,265	1.58	238,028	1.40	228,667		
390 Speech Language Pathologist Services	475,193	572,475	3.33	534,704	7.00	1,058,140		
395 Other Contracted Services	1,851,356	2,059,593	2.00	1,965,647	-	2,220,000		
400 Substitute List Subscription	-	-	-	-	0.09	9,266		
410 Courier Services	71,123	63,615	1.00	82,447	0.80	76,726		
430 Attendance and Truancy Services	11,827	4,208	0.05	5,541	-	-		
450 Superintendent Services	14,963	-	-	-	-	-		
450 Application Hosting and Management	-	-	-	-	-	13,416		
500 Library Services	88,647	87,208	1.00	109,620	1.00	116,878		
525 Professional Development	237,202	95,673	-	563,343	-	-		
526 Communications Services	188	1,002	-	-	-	-		
527 Nursing Services	38,285	24,425	0.63	88,388	0.80	114,340		
528 Youth Transition Program Services	15,922	17,125	-	-	-	-		
530 Transits to Districts	4,755,555	3,597,999	-	3,297,987	-	4,010,894		
Total Menu Services	22,671,550	22,537,657	184.11	23,227,319	189.17	26,265,564		
Administration								
010 Board of Education	363,643	391,437	-	437,125	-	371,825		
011 Office of Superintendent	490,194	487,404	2.05	487,066	2.50	684,136		
012 Human Resources	698,349	813,818	3.50	722,739	3.00	737,990		
013 Business Services	547,669	591,614	4.00	588,960	4.00	680,049		
014 Facilities - Main Campus	1,042,981	915,577	2.14	984,656	2.00	955,354		
015 Technology Services	476,192	566,335	3.05	570,895	3.00	587,558		
017 Facilities - Westmoreland	-	-	-	-	0.15	34,304		
019 Central Services	34,142	(169,913)	-	20,251	-	124,083		
080 Home Schooling	39,633	27,312	0.30	35,874	0.30	39,424		
Total Administration	3,692,803	3,623,583	15.04	3,847,567	14.95	4,214,723		
Contingencies	-	-	-	1,265,842	-	650,000		
Unappropriated Ending Fund Balance	-	-	-	800,000	-	1,833,453		
TOTAL REQUIREMENTS	27,986,695	28,067,119	205.95	31,373,479	215.29	46,038,990		

Special Revenue Fund

The Special Revenue Fund accounts for the proceeds of specific revenue sources that are legally restricted to expenditure for specified purposes.



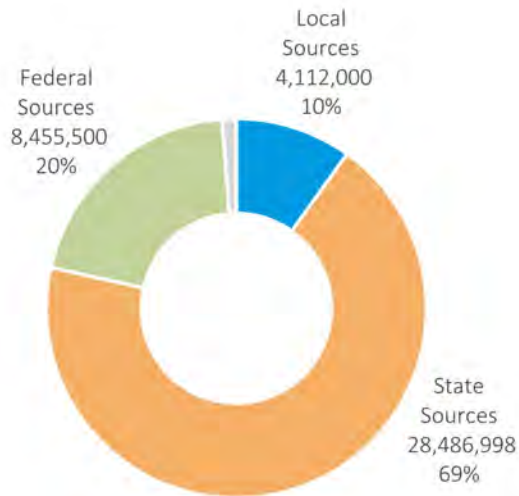
Lane ESD's summer migrant education program centers on culture, community, relationships, and learning.

Special Revenue Fund

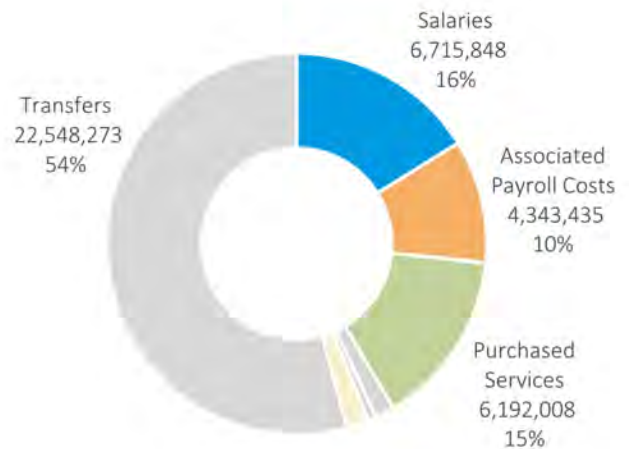
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	3,083,899	3,182,225		4,062,000		4,112,000		
3000 State Sources	26,238,534	21,354,968		26,629,500		28,486,998		
4000 Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 Other Sources	1,088,049	1,329,276		357,500		500,500		
Total Resources	38,083,524	34,169,272		39,965,000		41,554,998		
Requirements								
100 Salaries	6,264,491	6,974,667	85.43	6,887,637	79.38	6,715,848		
200 Associated Payroll Costs	3,360,292	3,912,201		4,110,181		4,343,435		
300 Purchased Services	4,981,784	3,332,292		3,775,600		6,192,008		
400 Supplies and Materials	1,252,435	1,113,559		1,696,288		690,578		
500 Capital Outlay	765,357	981,506		305,000		280,000		
600 Other Objects	970,734	845,029		1,084,970		784,856		
700 Transfers	19,386,155	16,439,074		22,105,324		22,548,273		
Total Requirements	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		
ENDING FUND BALANCE	1,102,277	570,944						

Resources



Requirements



Special Revenue Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1920 Contributions, Donations, and General Fundraising from Private Sources	205,372	81,010		481,000		625,000		
1940 Services Provided Other Local Education Agencies	2,670,156	2,884,067		3,490,000		3,375,000		
1960 Recovery of Prior Years' Expenditure	-	11,625		-		25,000		
1990 Miscellaneous	208,371	205,523		91,000		87,000		
Total Revenue from Local Sources	3,083,899	3,182,225		4,062,000		4,112,000		
3000 - Revenue from State Sources								
3299 Other Restricted Grants-in-aid	26,238,534	21,354,968		26,629,500		28,486,998		
Total Revenue from State Sources	26,238,534	21,354,968		26,629,500		28,486,998		
4000 - Revenue from Federal Sources								
4300 Restricted Revenue Direct from the Federal Government	4,160	249,201		110,000		-		
4500 Restricted Revenue From the Federal Government Through the State	7,583,177	7,902,957		8,701,000		8,360,500		
4700 Grants-In-Aid From the Federal Government Through Other Intermediate Agencies	82,042	150,644		100,000		95,000		
4900 Revenue for/on Behalf of the District	3,663	-		5,000		-		
Total Revenue from Federal Sources	7,673,042	8,302,803		8,916,000		8,455,500		
5000 - Revenue from Other Sources								
5200 Interfund Transfers	159,185	163,198		166,500		177,500		
5400 Beginning Fund Balances	928,865	1,166,079		191,000		323,000		
Total Revenue from Other Sources	1,088,049	1,329,276		357,500		500,500		
TOTAL RESOURCES	38,083,524	34,169,272		39,965,000		41,554,998		

Special Revenue Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
100 - Salaries								
111 Licensed Salaries	2,686,408	2,780,904	32.23	2,853,487	30.60	2,852,751		
112 Classified Salaries	2,210,876	2,741,833	47.22	2,765,742	44.08	2,693,948		
113 Administrators	508,090	847,717	5.15	717,612	4.60	707,343		
114 Managerial - Classified	65,020	63,761	0.53	39,179	0.10	8,071		
123 Temporary - Licensed	610,132	457,865	0.30	289,633	-	200,000		
124 Temporary - Classified	178,765	71,137	-	150,000	-	100,000		
130 Additional Salary	5,200	11,450	-	71,984	-	153,735		
Total Salaries	6,264,491	6,974,667	85.43	6,887,637	79.38	6,715,848		
200 - Associated Payroll Costs								
210 Public Employees Retirement System	1,662,693	2,012,313		2,105,148		2,457,575		
220 Social Security Administration	474,102	524,645		604,456		513,762		
230 Other Required Payroll Costs	112,789	82,001		81,684		101,626		
240 Contractual Employee Benefits	1,110,707	1,293,242		1,318,893		1,270,471		
Total Associated Payroll Costs	3,360,292	3,912,201		4,110,181		4,343,435		
300 - Purchased Services								
310 Instructional, Professional and Technical Services	2,238,553	1,696,363		2,273,000		4,741,643		
320 Property Services	80,473	65,350		47,300		81,000		
330 Student Transportation Services	34,948	88,036		-		-		
340 Travel	339,478	228,293		191,400		176,350		
350 Communication	276,020	128,370		54,800		48,145		
374 Other Tuition	380,804	193,599		425,000		292,721		
380 Non-Instructional Professional and Technical Services	1,631,508	932,282		784,100		852,150		
Total Purchased Services	4,981,784	3,332,292		3,775,600		6,192,008		
400 - Supplies and Materials								
410 Consumable Supplies and Materials	566,593	578,483		1,107,442		448,569		
420 Textbooks	63,030	11,852		23,100		10,000		
430 Library Books	11,219	-		-		-		
440 Periodicals	-	25		-		-		
450 Food	3,663	-		5,000		-		
460 Non-Consumable Items	167,612	165,443		215,843		59,000		
470 Computer Software	354,172	290,171		269,000		138,010		
480 Computer Hardware	86,146	67,584		75,903		35,000		
Total Supplies and Materials	1,252,435	1,113,559		1,696,288		690,578		
500 - Capital Outlay								
540 Depreciable Equipment	67,027	249,201		100,000		-		
550 Depreciable Technology	-	654,615		205,000		280,000		
590 Other Capital Outlay	698,330	77,690		-		-		
Total Capital Outlay	765,357	981,506		305,000		280,000		

Special Revenue Fund

Requirements by Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
600 - Other Objects								
640 Dues and Fees	30,668	32,044		19,100		45,300		
690 Grant Indirect Charges	940,066	812,985		1,065,870		739,556		
Total Other Objects	970,734	845,029		1,084,970		784,856		
700 - Transfers								
710 Fund Modifications	-	-		2,500		-		
720 Transits	19,386,155	16,439,074		22,102,824		22,548,273		
Total Transfers	19,386,155	16,439,074		22,105,324		22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1000 - Instruction								
1111 Elementary, K-5 or K-6	-	37,211	-	-	-	-		
1121 Middle/Junior High School Programs	-	2,161	-	-	-	-		
1140 Pre-Kindergarten Programs	767	-	-	-	-	-		
1220 Restrictive Programs for Students with Disabilities	486,733	496,576	3.40	1,096,214	6.10	1,417,073		
1250 Less Restrictive Programs for Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 Alternative Education	-	6,261	2.00	162,500	-	-		
1293 Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1400 Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	3,097,157	3,252,258	17.15	3,252,835	18.95	3,739,197		
2000 - Support Services								
2110 Attendance and Social Work Services	881,112	814,781	7.50	867,250	4.61	532,772		
2120 Guidance Services	897,273	1,029,380	1.70	325,060	1.50	242,569		
2130 Health Services	21,091	54,230	-	55,000	-	53,000		
2150 Speech Pathology and Audiology Services	7,274	-	-	3,000	0.50	80,293		
2190 Service Direction, Student Support Services	128,957	178,619	0.58	179,248	1.30	346,507		
2210 Improvement of Instruction Services	5,349,770	4,586,035	19.63	5,863,092	15.37	6,870,453		
2240 Instructional Staff Development	3,581,605	3,409,294	9.43	3,728,371	8.75	3,539,434		
2540 Operation and Maintenance of Plant Services	763,749	329,294	-	110,000	-	-		
2550 Student Transportation Services	5,729	-	-	-	-	-		
2620 Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services	41,658	125	-	-	-	-		
2640 Staff Services	171,385	17,925	-	74,284	-	47,500		
2660 Technology Services	259,864	830,656	1.00	366,536	-	355,000		
2680 Interpretation and Translation Services	2,325,014	2,596,694	28.44	2,960,000	28.40	3,120,000		
Total Support Services	14,434,480	13,847,033	68.28	14,531,841	60.43	15,187,528		
3000 - Enterprise and Community Services								
3100 Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5000 - Other Uses								
5200 Transfers of Funds	-	-	-	2,500	-	-		
5300 Apportionment of Funds by ESD	19,386,155	16,439,074	-	22,102,824	-	22,548,273		
Total Other Uses	19,386,155	16,439,074	-	22,105,324	-	22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
1111 - Elementary, K-5 or K-6								
310 Instructional, Professional and Technical Services	-	35,736		-		-		
640 Dues and Fees	-	1,475		-		-		
Total Elementary, K-5 or K-6	-	37,211	-	-	-	-		
1121 - Middle/Junior High School Programs								
310 Instructional, Professional and Technical Services	-	736		-		-		
640 Dues and Fees	-	1,425		-		-		
Total Middle/Junior High School Programs	-	2,161	-	-	-	-		
1140 - Pre-Kindergarten Programs								
340 Travel	145	-		-		-		
410 Consumable Supplies and Materials	575	-		-		-		
420 Textbooks	47	-		-		-		
Total Pre-Kindergarten Programs	767		-	-	-	-		
1220 - Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	255,183	308,137	3.40	299,356	6.10	548,734		
112 Classified Salaries	30,784	-	-	-	-	-		
130 Additional Salary	-	2,650		3,510		6,000		
210 Public Employees Retirement System	78,222	90,449		92,271		204,585		
220 Social Security Administration	21,820	23,576		26,728		42,437		
230 Other Required Payroll Costs	4,939	3,647		3,566		6,526		
240 Contractual Employee Benefits	54,083	61,715		56,428		100,701		
310 Instructional, Professional and Technical Services	399	-		500,000		500,000		
320 Property Services	431	492		500		900		
340 Travel	1,295	602		1,000		700		
350 Communication	1,148	2,655		2,700		-		
380 Non-Instructional Professional and Technical Services	550	-		-		-		
410 Consumable Supplies and Materials	265	739		6,305		4,490		
420 Textbooks	2,855	80		100		-		
460 Non-Consumable Items	4,157	-		-		-		
470 Computer Software	2,367	1,462		2,500		2,000		
480 Computer Hardware	-	18		-		-		
640 Dues and Fees	555	-		-		-		
690 Grant Indirect Charges	27,680	354		101,250		-		
Total Restrictive Programs for Students with Disabilities	486,733	496,576	3.40	1,096,214	6.10	1,417,073		
1250 - Less Restrictive Programs for Students with Disabilities								
111 Licensed Salaries	654,746	751,936	8.00	662,968	9.00	767,347		
112 Classified Salaries	21,704	11,837	-	-	-	-		
123 Temporary - Licensed	9,809	11,531	-	-	-	-		
210 Public Employees Retirement System	199,520	237,018		204,650		283,367		
220 Social Security Administration	52,051	58,278		56,646		58,702		
230 Other Required Payroll Costs	11,174	9,013		7,786		9,008		
240 Contractual Employee Benefits	133,600	161,043		146,354		195,576		
310 Instructional, Professional and Technical Services	130,175	94,059		106,000		4,500		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
330 Student Transportation Services	-	150		-		-		
340 Travel	19,072	16,720		15,100		9,000		
350 Communication	5,960	8,958		12,350		13,500		
380 Non-instructional Professional and Technical Services	110	-		-		-		
410 Consumable Supplies and Materials	5,874	1,986		27,949		26,750		
420 Textbooks	448	-		-		-		
460 Non-Consumable Items	19,704	38,081		17,000		5,000		
470 Computer Software	5,646	4,742		3,500		4,450		
480 Computer Hardware	2,370	4,379		5,000		-		
640 Dues and Fees	229	96		-		-		
690 Grant Indirect Charges	113,122	172,417		-		50,000		
Total Less Restrictive Programs for Students with Disabilities	1,385,315	1,582,246	8.00	1,265,303	9.00	1,427,200		
1280 - Alternative Education								
111 Licensed Salaries	-	-	1.00	56,736	-	-		
112 Classified Salaries	-	4,353	1.00	36,406	-	-		
210 Public Employees Retirement System	-	213		28,716		-		
220 Social Security Administration	-	307		8,510		-		
230 Other Required Payroll Costs	-	51		1,110		-		
240 Contractual Employee Benefits	-	1,336		26,667		-		
410 Consumable Supplies and Materials	-	-		4,356		-		
Total Alternative Education	-	6,261	2.00	162,500	-	-		
1293 - Migrant Education								
111 Licensed Salaries	1,315	-	-	-	-	-		
112 Classified Salaries	25,448	91,821	0.50	41,884	0.50	43,350		
113 Administrators	114,490	91,481	-	-	0.30	48,188		
123 Temporary - Licensed	86,171	103,035	-	-	-	-		
124 Temporary - Classified	19,003	40,205	-	-	-	-		
130 Additional Salary	-	-		838		871		
210 Public Employees Retirement System	54,648	80,527		12,697		33,064		
220 Social Security Administration	18,561	24,763		3,268		7,069		
230 Other Required Payroll Costs	3,727	4,358		516		3,262		
240 Contractual Employee Benefits	26,709	26,786		4,275		13,945		
310 Instructional, Professional and Technical Services	85,035	32,099		-		200,000		
320 Property Services	28,414	15,612		4,500		2,150		
330 Student Transportation Services	26,998	84,355		-		-		
340 Travel	15,420	20,007		5,000		1,200		
350 Communication	11,571	15,696		5,250		4,100		
380 Non-instructional Professional and Technical Services	60,887	4,782		-		-		
410 Consumable Supplies and Materials	75,464	18,439		9,753		35,027		
420 Textbooks	28,886	7,640		10,000		-		
460 Non-Consumable Items	-	34		-		-		
470 Computer Software	2,886	4,500		5,000		-		
640 Dues and Fees	1,565	13		-		-		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
690 Grant Indirect Charges	33,858	8,766		45,770		-		
Total Migrant Education	721,057	674,918	0.50	148,750	0.80	392,228		
1294 - Youth Corrections Education								
111 Licensed Salaries	252,001	252,949	3.20	289,891	3.00	276,355		
130 Additional Salary	-	-		3,600		6,000		
210 Public Employees Retirement System	58,564	77,683		90,477		104,175		
220 Social Security Administration	19,495	19,718		26,682		21,600		
230 Other Required Payroll Costs	4,012	2,960		3,439		3,333		
240 Contractual Employee Benefits	63,624	49,138		57,865		45,936		
310 Instructional, Professional and Technical Services	79,439	-		-		-		
320 Property Services	622	711		700		2,200		
340 Travel	92	3		-		-		
350 Communication	535	624		800		-		
380 Non-Instructional Professional and Technical Services	36	-		-		-		
410 Consumable Supplies and Materials	4,562	4,809		85,798		17,598		
420 Textbooks	667	-		-		-		
460 Non-Consumable Items	6,646	741		1,000		-		
470 Computer Software	375	712		1,000		3,000		
480 Computer Hardware	8,811	274		-		2,500		
690 Grant Indirect Charges	1,714	9,561		8,100		-		
Total Youth Corrections Education	501,195	419,884	3.20	569,352	3.00	482,696		
1400 - Summer School Programs								
112 Classified Salaries	-	2,129	0.05	3,819	0.05	3,655		
123 Temporary - Licensed	-	9,500		-		-		
124 Temporary - Classified	-	8,470		-		-		
210 Public Employees Retirement System	-	2,948		1,135		1,308		
220 Social Security Administration	-	1,538		292		280		
230 Other Required Payroll Costs	-	238		45		43		
240 Contractual Employee Benefits	-	262		425		423		
310 Instructional, Professional and Technical Services	-	3,200		-		-		
330 Student Transportation Services	-	640		-		-		
340 Travel	-	138		-		300		
380 Non-Instructional Professional and Technical Services	-	-		-		4,000		
410 Consumable Supplies and Materials	2,090	3,942		5,000		9,992		
Total Summer School Programs	2,090	33,002	0.05	10,716	0.05	20,000		
Total Instruction	3,097,157	3,252,258	17.15	3,252,835	18.95	3,739,197		
2110 - Attendance and Social Work Services								
111 Licensed Salaries	2,602	43,797	1.00	70,816	-	-		
112 Classified Salaries	458,546	375,577	6.50	411,752	4.61	289,427		
123 Temporary - Licensed	15,251	19,309	-	-	-	-		
130 Additional Salary	-	-		12,625		5,817		
210 Public Employees Retirement System	128,475	129,298		149,112		107,888		
220 Social Security Administration	35,981	32,617		43,219		22,586		
230 Other Required Payroll Costs	7,517	5,105		6,072		5,735		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
240 Contractual Employee Benefits	69,541	84,263		99,646		60,931		
310 Instructional, Professional and Technical Services	6,750	1,483		1,000		-		
320 Property Services	315	14,156		15,000		4,150		
340 Travel	32,768	6,540		7,500		100		
350 Communication	7,622	5,257		3,500		5,200		
380 Non-Instructional Professional and Technical Services	3,106	24,345		100		-		
410 Consumable Supplies and Materials	32,678	34,666		2,909		6,000		
420 Textbooks	17,057	583		1,000		-		
460 Non-Consumable Items	2,407	-		-		-		
470 Computer Software	12,483	9,599		1,000		2,500		
480 Computer Hardware	4,495	339		-		2,500		
640 Dues and Fees	1,573	-		-		500		
690 Grant Indirect Charges	41,944	27,846		42,000		19,440		
Total Attendance and Social Work Services	881,112	814,781	7.50	867,250	4.61	537,772		
2120 - Guidance Services								
111 Licensed Salaries	155,098	83,133	1.00	71,032	1.50	144,298		
112 Classified Salaries	98,873	121,974	-	-	-	-		
113 Administrators	3,888	3,745	0.70	93,087	-	-		
210 Public Employees Retirement System	62,939	56,517		50,793		51,630		
220 Social Security Administration	19,520	15,515		13,939		11,039		
230 Other Required Payroll Costs	4,226	2,457		1,928		1,694		
240 Contractual Employee Benefits	48,943	46,184		24,422		17,659		
310 Instructional, Professional and Technical Services	268,062	345,982		-		750		
320 Property Services	-	-		-		600		
340 Travel	2,321	1,172		10,000		950		
350 Communication	1,098	6,399		200		25		
374 Other Tuition	10,012	-		-		-		
380 Non-Instructional Professional and Technical Services	70,357	390		-		-		
410 Consumable Supplies and Materials	5,142	122,987		42,658		5,319		
460 Non-Consumable Items	18,835	115,337		-		-		
470 Computer Software	-	6,414		-		-		
480 Computer Hardware	16,007	21,124		-		-		
540 Depreciable Equipment	67,027	-		-		-		
640 Dues and Fees	409	-		-		-		
690 Grant Indirect Charges	44,518	80,050		17,000		8,606		
Total Guidance Services	897,273	1,029,380	1.70	325,060	1.50	242,569		
2130 - Health Services								
111 Licensed Salaries	(131)	27,165	-	-	-	-		
112 Classified Salaries	7,274	2,640	-	-	-	-		
210 Public Employees Retirement System	2,070	7,883	-	-	-	-		
220 Social Security Administration	552	2,146	-	-	-	-		
230 Other Required Payroll Costs	101	448	-	-	-	-		
240 Contractual Employee Benefits	1,391	5,272	-	-	-	-		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
310 Instructional, Professional and Technical Services	-	2,075		35,000		40,000		
340 Travel	230	-		-		-		
410 Consumable Supplies and Materials	1,385	1,351		18,000		13,000		
460 Non-Consumable Items	8,219	-		-		-		
640 Dues and Fees	-	5,250		-		-		
690 Grant Indirect Charges	-	-		2,000		-		
Total Health Services	21,091	54,230		55,000		53,000		
2150 - Speech Pathology and Audiology Services								
111 Licensed Salaries	-	-	-	-	0.50	52,183		
210 Public Employees Retirement System	-	-	-	-		18,671		
220 Social Security Administration	-	-	-	-		3,992		
230 Other Required Payroll Costs	-	-	-	-		611		
240 Contractual Employee Benefits	-	-	-	-		4,835		
410 Consumable Supplies and Materials	73	-	-	-		-		
460 Non-Consumable Items	6,821	-	-	3,000		-		
470 Computer Software	380	-	-	-		-		
Total Speech Pathology and Audiology Services	7,274	-	-	3,000	0.50	80,293		
2190 - Service Direction, Student Support Services								
112 Classified Salaries	-	-	-	-	0.50	22,329		
113 Administrators	49,589	92,767	0.55	78,638	0.70	108,718		
114 Managerial - Classified	1,830	-	0.03	1,866	0.10	8,071		
210 Public Employees Retirement System	15,816	28,941	-	25,309	-	52,757		
220 Social Security Administration	3,909	7,078	-	6,218	-	10,643		
230 Other Required Payroll Costs	818	1,067	-	942	-	1,635		
240 Contractual Employee Benefits	7,048	16,537	-	9,774	-	31,646		
320 Property Services	4,979	4,290	-	4,400	-	11,100		
340 Travel	213	912	-	600	-	5,000		
350 Communication	-	537	-	500	-	-		
380 Non-Instructional Professional and Technical Services	-	13,080	-	-	-	35,000		
460 Non-Consumable Items	-	-	-	-	-	2,000		
470 Computer Software	-	232	-	-	-	500		
640 Dues and Fees	-	-	-	-	-	1,000		
690 Grant Indirect Charges	44,755	13,177	-	51,000	-	56,108		
Total Service Direction, Student Support Services	128,957	178,619	0.58	179,248	1.30	346,507		
2210 - Improvement of Instruction Services								
111 Licensed Salaries	867,456	876,168	10.63	1,012,485	7.00	722,102		
112 Classified Salaries	292,849	326,049	6.10	369,938	6.47	418,159		
113 Administrators	274,398	457,601	2.40	339,107	1.90	288,374		
114 Managerial - Classified	63,190	63,761	0.50	37,313	-	-		
123 Temporary - Licensed	267,183	36,970	-	-	-	-		
124 Temporary - Classified	24,731	6,980	-	-	-	-		
130 Additional Salary	-	-	-	23,400	-	31,047		
210 Public Employees Retirement System	475,988	522,008	-	548,185	-	533,523		
220 Social Security Administration	135,473	133,905	-	156,662	-	111,666		
230 Other Required Payroll Costs	40,197	20,317	-	21,097	-	17,258		
240 Contractual Employee Benefits	238,462	267,960	-	308,248	-	221,960		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
310 Instructional, Professional and Technical Services	873,955	532,509		1,130,000		3,513,393		
320 Property Services	8,974	13,543		5,200		27,650		
330 Student Transportation Services	2,222	2,890				-		
340 Travel	175,668	137,414		93,200		93,100		
350 Communication	21,718	12,183		2,800		1,170		
374 Other Tuition	22,616	13,675		-		-		
380 Non-Instructional Professional and Technical Services	551,863	319,149		195,000		273,150		
410 Consumable Supplies and Materials	339,109	364,613		820,646		218,894		
420 Textbooks	9,509	1,744		10,000		-		
430 Library Books	11,219	-		-		-		
440 Periodicals	-	25		-		-		
460 Non-Consumable Items	97,748	7,244		164,559		32,000		
470 Computer Software	193,589	214,407		191,000		17,950		
480 Computer Hardware	49,607	6,833		10,903		5,000		
640 Dues and Fees	25,906	13,961		11,100		30,300		
690 Grant Indirect Charges	286,140	234,127		412,250		313,760		
Total Improvement of Instruction Services	5,349,770	4,586,035	19.63	5,863,092	15.37	6,870,453		
2240 - Instructional Staff Development								
111 Licensed Salaries	498,138	437,618	4.00	390,204	3.50	341,732		
112 Classified Salaries	185,054	246,478	4.13	269,202	3.95	281,377		
113 Administrators	-	140,595	1.00	132,109	1.30	199,589		
123 Temporary - Licensed	231,718	275,141	0.30	289,633	-	200,000		
124 Temporary - Classified	135,030	11,855	-	150,000	-	100,000		
130 Additional Salary	-	-		3,600		6,000		
210 Public Employees Retirement System	282,699	322,870		377,135		413,410		
220 Social Security Administration	78,977	82,513		108,257		86,345		
230 Other Required Payroll Costs	16,989	12,916		14,589		31,066		
240 Contractual Employee Benefits	152,315	178,090		167,888		168,019		
310 Instructional, Professional and Technical Services	792,267	646,627		475,000		481,000		
320 Property Services	23,942	4,695		4,800		18,450		
340 Travel	69,673	38,519		53,000		56,000		
350 Communication	5,783	5,305		6,700		1,150		
374 Other Tuition	348,176	179,924		425,000		292,721		
380 Non-Instructional Professional and Technical Services	418,631	496,298		500,000		451,000		
410 Consumable Supplies and Materials	80,908	23,322		55,755		83,000		
420 Textbooks	3,608	1,804		2,000		10,000		
460 Non-Consumable Items	699	-		5,000		-		
470 Computer Software	18,789	32,808		40,000		45,610		
480 Computer Hardware	2,288	2,077		5,000		-		
640 Dues and Fees	401	3,153		7,000		7,500		
690 Grant Indirect Charges	235,520	266,687		246,500		265,467		
Total Instructional Staff Development	3,581,605	3,409,294	9.43	3,728,371	8.75	3,539,434		
2540 - Operation and Maintenance of Plant Services								
380 Non-Instructional Professional and Technical Services	65,418	2,403		10,000		-		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23	2023-24	2024-25		2025-26 Budget			
	Actual	Actual	FTE	Proposed	FTE	Proposed	Approved	Adopted
480 Computer Hardware	698,330	-		-		-		
540 Depreciable Equipment	-	249,201		100,000		-		
590 Other Capital Outlay	-	77,690		-		-		
Total Operation and Maintenance of Plant Services	763,749	329,294	-	110,000	-	-		
2550 - Student Transportation Services								
330 Student Transportation Services	5,729	-		-		-		
Total Student Transportation Services	5,729	-	-	-	-	-		
2620 - Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services								
320 Property Services	2,071	-		-		-		
340 Travel	1,798	125		-		-		
380 Non-Instructional Professional and Technical Services	22,542	-		-		-		
410 Consumable Supplies and Materials	15,247	-		-		-		
Total Planning, Research, Development, Evaluation Services, Grant Writing, and Statistical Services	41,658	125	-	-	-	-		
2640 - Staff Services								
123 Temporary - Licensed	-	2,378		-		-		
124 Temporary - Classified	-	3,628		-		-		
210 Public Employees Retirement System	-	1,683		-		-		
220 Social Security Administration	-	436		-		-		
230 Other Required Payroll Costs	-	71		-		-		
240 Contractual Employee Benefits	-	20		-		-		
310 Instructional, Professional and Technical Services	-	-		25,000		-		
340 Travel	17,983	-		-		-		
350 Communication	130,521	-		-		-		
380 Non-Instructional Professional and Technical Services	19,972	-		-		-		
410 Consumable Supplies and Materials	2,909	1,481		25,000		27,500		
460 Non-Consumable Items	-	1,992		24,284		20,000		
640 Dues and Fees	-	6,237		-		-		
Total Staff Services	171,385	17,925	-	74,284	-	47,500		
2660 - Technology Services								
112 Classified Salaries	48,879	55,260	1.00	58,760	-	-		
130 Additional Salary	-	-	-	1,175	-	-		
210 Public Employees Retirement System	9,635	16,334		17,813		-		
220 Social Security Administration	3,613	4,206		4,585		-		
230 Other Required Payroll Costs	793	651		737		-		
240 Contractual Employee Benefits	7,818	7,772		8,466		-		
310 Instructional, Professional and Technical Services	-	1,057		-		-		
350 Communication	75,153	50,594		-		-		
460 Non-Consumable Items	-	1,508		-		-		
470 Computer Software	113,972	10,272		20,000		50,000		
480 Computer Hardware	-	28,387		50,000		25,000		

Special Revenue Fund

Requirements by Function / Object (continued)

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
550 Depreciable Technology	-	654,615		205,000		280,000		
Total Technology Services	259,864	830,656	1.00	366,536	-	355,000		
2680 - Interpretation and Translation Services								
112 Classified Salaries	1,041,465	1,503,714	27.94	1,573,982	28.00	1,635,653		
113 Administrators	65,725	61,528	0.50	74,671	0.40	62,474		
130 Additional Salary	5,200	8,800	-	23,237	-	98,000		
210 Public Employees Retirement System	294,118	437,940		506,857		653,199		
220 Social Security Administration	84,148	118,049		149,449		137,404		
230 Other Required Payroll Costs	18,296	18,705		19,855		21,456		
240 Contractual Employee Benefits	307,172	386,865		408,438		408,839		
310 Instructional, Professional and Technical Services	2,470	800		1,000		2,000		
320 Property Services	10,725	11,850		12,200		13,800		
340 Travel	2,801	6,141		6,000		10,000		
350 Communication	14,912	20,162		20,000		23,000		
380 Non-Instructional Professional and Technical Services	358,243	12,307		10,000		10,000		
410 Consumable Supplies and Materials	311	147		3,312		1,000		
460 Non-Consumable Items	2,329	507		1,000		-		
470 Computer Software	3,685	5,024		5,000		12,000		
480 Computer Hardware	2,568	4,154		5,000		-		
640 Dues and Fees	30	-		-		5,000		
690 Grant Indirect Charges	110,815	-		140,000		26,175		
Total Interpretation and Translation Services	2,325,014	2,596,694	28.44	2,960,000	28.40	3,120,000		
Total Support Services	14,434,480	13,847,033	68.28	14,531,841	60.43	15,187,528		
3100 - Food Services								
380 Non-Instructional Professional and Technical Services	59,792	59,528		69,000		79,000		
450 Food	3,663	-		5,000		-		
640 Dues and Fees	-	435		1,000		1,000		
Total Food Services	63,455	59,963	-	75,000	-	80,000		
Total Enterprise and Community Services	63,455	59,963	-	75,000	-	80,000		
5200 - Transfers of Funds								
710 Fund Modifications	-	-		2,500		-		
Total Transfers of Funds	-	-	-	2,500	-	-		
5300 - Apportionment of Funds by ESD								
720 Transits	19,386,155	16,439,074		22,102,824		22,548,273		
Total Apportionment of Funds by ESD	19,386,155	16,439,074	-	22,102,824	-	22,548,273		
Total Other Uses	19,386,155	16,439,074	-	22,105,324	-	22,548,273		
TOTAL REQUIREMENTS	36,981,247	33,598,328	85.43	39,965,000	79.38	41,554,998		

Special Revenue Fund

Requirements by Service Area / Program

	2022-23 Actual	2023-24 Actual	2024-25 Budget		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Programs for Children with Special Needs								
Child Nutrition Programs	63,455	59,963	-	75,000	-	80,000		
Connected Lane County	-	-	-	-	-	-		
Early Intervention / Early Childhood Special Education	18,567,913	15,416,549	0.03	21,000,000	0.03	21,000,000		
IDEA Regional Technical Assistance Program	-	73,272	0.30	75,000	0.30	80,000		
Juvenile Detention Education Program	356,457	272,645	2.30	514,000	2.70	544,000		
Martin Luther King, Jr. Education Center	187,783	219,536	1.80	265,000	1.00	150,000		
Miscellaneous Special Education Grants	50,250	68,016	-	67,000	-	75,000		
Oregon Early Childhood Inclusion Initiative	-	216,141	-	214,000	-	-		
Regional Inclusive Services	1,497,682	1,809,993	10.70	1,750,000	15.65	2,500,000		
School Violence Prevention Program	4,160	249,201	-	110,000	-	-		
Sign Language Interpreter Services	2,325,014	2,596,694	28.45	2,960,000	28.40	3,120,000		
State Hospital Education Program	144,700	150,000	1.05	184,000	1.03	200,000		
Youth Transition Program	657,909	653,243	-	-	-	-		
Total Programs for Children with Special Needs	23,855,323	21,536,050	44.63	27,104,000	49.10	27,749,000		
School Improvement Services								
African American Black Student Success	1,087,585	469,241	-	-	-	-		
Behavioral Health CTE Program	-	-	-	-	-	55,000		
CTE Revitalization: Manufacturing	236,396	46,558	-	-	-	-		
CTE Revitalization: Health Science	212,608	-	-	-	-	-		
Governor's Emergency Education Relief Fund	36,397	243,951	1.50	163,000	-	-		
Grow Your Own: Teacher Pathways	451,257	257,097	1.13	600,000	0.65	465,000		
Health Care Workforce CTE Program	-	-	-	-	-	362,000		
K-8 Data Reasoning & Integration Project	-	38,802	-	-	-	-		
Latinx Student Success	-	-	-	-	-	190,000		
Lane Career Academy: HOPE Factory	-	6,261	2.00	165,000	-	-		
LGBTQ+ Student Success	-	-	-	-	0.40	150,000		
Menstrual Dignity Act	8,460	169	-	20,000	-	10,000		
Miscellaneous School Improvement Grants	159,638	155,129	0.05	125,000	0.05	275,000		
Native Youth Wellness	174,353	318,463	2.00	529,000	2.25	450,000		
Binational Teacher Exchange Program	42,191	1,275	-	45,000	-	60,000		
BOLI Future Ready Oregon: Construction	131,008	132,949	-	-	-	-		
BOLI Future Ready Oregon: Manufacturing	3,399	464,702	-	-	-	-		
Oregon Math Program	575,124	30,000	-	-	0.35	200,000		
PacificSource System of Care Agile Funding	-	55,000	-	-	-	-		
Pathways to Apprenticeship: Computer Science	64,284	-	-	-	-	-		
Perkins	1,070,631	1,059,376	1.20	1,000,000	1.50	1,070,000		
Research for Better Teaching	62,401	39,095	-	60,000	-	95,000		
School Safety and Prevention System Specialist	81,495	47,184	1.00	190,000	1.00	165,000		
Secondary Career Pathways	22,005	8,511	-	-	-	18,000		
STEM Hub: Backbone	199,272	210,361	0.25	360,000	1.50	250,000		
STEM Hub: Computer Science	365,258	76,251	1.50	223,000	-	-		
STEM Hub: Innovation	151,173	28,642	0.25	300,000	0.50	225,000		

Special Revenue Fund

Requirements by Service Area / Program (continued)

	2022-23 Actual	2023-24 Actual	2024-25 Budget		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Student Success Act: ESD Technical Assistance	1,966,408	1,895,727	10.70	2,000,000	7.40	1,910,000		
Team Oregon Build	-	416,568	2.00	1,000,000	-	230,000		
Title I-C: Migrant Education Program	1,565,706	1,411,814	8.00	1,016,000	5.41	925,000		
Title III: Multilingual Language Learners	91,079	90,774	0.23	70,000	0.20	88,000		
Title IV-B: 21st Century Community Learning Centers	-	231,307	-	-	-	425,000		
Western Regional Educator Network	2,852,410	3,036,684	9.00	3,110,000	8.30	2,957,998		
Workforce Ready: Healthcare	-	-	-	-	0.77	875,000		
Youth Reengagement Program	169,542	-	-	-	-	-		
Total School Improvement Services	11,780,080	10,771,890	40.80	10,976,000	30.28	11,450,998		
Technology Support								
Infrastructural Technology Equipment	189,125	745,375	-	275,000	-	355,000		
Total Technology Support	189,125	745,375	-	275,000	-	355,000		
Administrative and Support Services								
Elementary and Secondary School Emergency Relief Fund (ESSER)	1,156,719	295,811	-	-	-	-		
Total Administrative and Support Services	1,156,719	295,811	-	-	-	-		
Excess Appropriations	-	-	-	1,500,000	-	2,000,000		
TOTAL REQUIREMENTS	36,981,247	33,349,126	85.43	39,855,000	79.38	41,554,998		

Debt Service Fund

The Debt Service Fund accounts for the accumulation of resources for, and the payment of, general long-term debt, principal and interest.



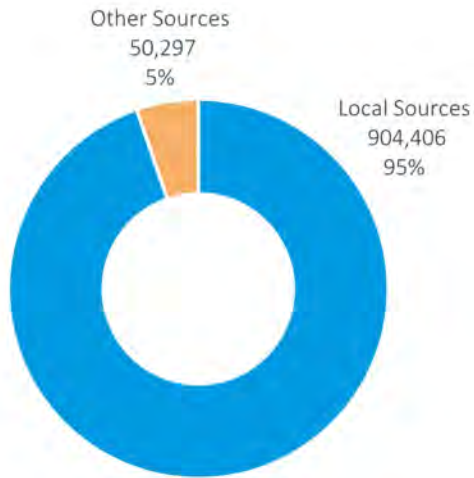
The Lane Career Academy collaboration provides Lane County students with technical education to access high-wage, high-demand jobs. Current programming includes HOPE Factory (construction/manufacturing); future programming to include Emergency Medical Services and Behavioral Health.

Debt Service Fund

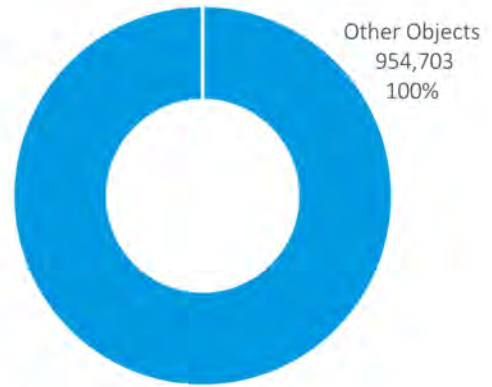
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	837,705	890,341		873,155		904,406		
5000 Other Sources	75,581	58,720		43,700		50,297		
Total Resources	913,285	949,061		916,855		954,703		
Requirements								
600 Other Objects	854,566	885,021		916,855		954,703		
Total Requirements	854,566	885,021		916,855		954,703		
ENDING FUND BALANCE	58,720	64,039		-		-		

Resources



Requirements



Debt Service Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1500 Earnings on Investments	15,265	25,326		18,000		18,000		
1970 Services Provided Other Funds	822,440	865,015		855,155		886,406		
Total Revenue from Local Sources	837,705	890,341		873,155		904,406		
5000 - Revenue from Other Sources								
5400 Beginning Fund Balance	75,581	58,720		43,700		50,297		
Total Revenue from Other Sources	75,581	58,720		43,700		50,297		
TOTAL RESOURCES	913,285	949,061		916,855		954,703		

Debt Service Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
600 - Other Objects								
610 Redemption of Principal	615,000	680,000		750,000		830,000		
621 Regular Interest	239,565	205,021		166,825		124,698		
640 Dues and Fees	1	1		30		5		
Total Other Objects	854,566	885,021		916,855		954,703		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Debt Service Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2640 Staff Services	1	1		30		5		
Total Support Services	1	1		30		5		
5000 - Other Uses								
5100 Debt Service	854,565	885,021		916,825		954,698		
Total Other Uses	854,565	885,021		916,825		954,698		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Debt Service Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Proposed	FTE	Proposed	Approved	Adopted
2640 - Staff Services								
640 Dues and Fees	1	1		30		5		
Total Staff Services	1	1		30		5		
Total Support Services	1			30		5		
5100 - Debt Service								
610 Redemption of Principal	615,000	680,000		750,000		830,000		
621 Regular Interest	239,565	205,021		166,825		124,698		
Total Debt Service	854,565	885,021		916,825		954,698		
Total Other Uses	854,565	885,021		916,825		954,698		
TOTAL REQUIREMENTS	854,566	885,021	-	916,855	-	954,703		

Capital Projects Fund

The Capital Projects Fund accounts for financial resources used to acquire or construct major capital facilities.



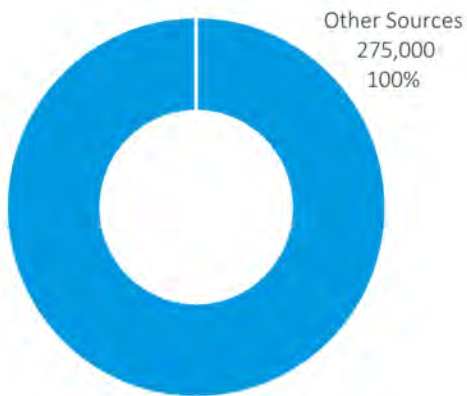
Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

Capital Projects Fund

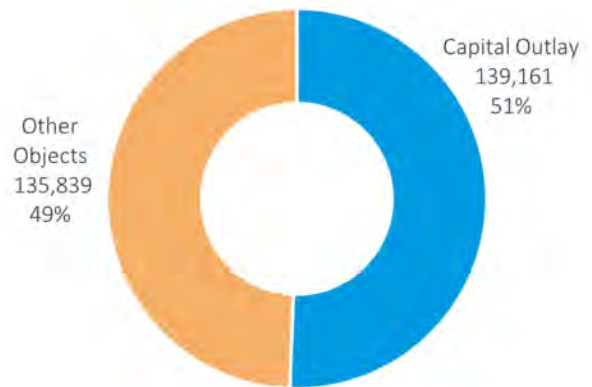
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Resources								
5000 Other Sources	461,073	829,295		285,000		275,000		
Total Resources	461,073	829,295		285,000		275,000		
Requirements								
300 Purchased Services	153,711	54,363		-		-		
400 Supplies and Materials	-	2,478		-		-		
500 Capital Outlay	-	700,947		148,914		139,161		
600 Other Objects	63,067	71,507		136,086		135,839		
Total Requirements	216,778	829,295		285,000		275,000		
ENDING FUND BALANCE	244,295	-		-		-		

Resources



Requirements



Capital Projects Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
5000 - Revenue from Other Sources								
5100 Long-Term Debt Financing Sources	-	300,000		-		-		
5200 Interfund Transfers	299,815	285,000		285,000		275,000		
5400 Beginning Fund Balance	161,258	244,295		-		-		
Total Revenue from Other Sources	461,073	829,295		285,000		275,000		
TOTAL RESOURCES	461,073	829,295		285,000		275,000		

Capital Projects Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
300 - Purchased Services								
320 Property Services	125,338	18,854		-		-		
380 Non-Instructional Professional and Technical Services	28,372	35,509		-		-		
Total Purchased Services	153,711	54,363		-		-		
400 - Supplies and Materials								
460 Non-Consumable Items	-	2,478		148,914		-		
Total Supplies and Materials	-	2,478		148,914		-		
500 - Capital Outlay								
540 Depreciable Equipment	-	5,410		148,914		-		
590 Other Capital Outlay	-	695,537		-		139,161		
Total Capital Outlay	-	700,947		148,914		139,161		
600 - Other Objects								
610 Redemption of Principal	40,682	42,077		98,164		102,384		
621 Regular Interest	22,386	20,990		37,922		33,455		
640 Dues and Fees	-	8,440		-		-		
Total Other Objects	63,067	71,507		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295	-	285,000	-	275,000		

Capital Projects Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2540 Operation and Maintenance of Plant Services	153,711	766,228		148,914		139,161		
Total Support Services	153,711	766,228		148,914		139,161		
5000 - Other Uses								
5100 Debt Service	63,067	63,067		136,086		135,839		
Total Other Uses	63,067	63,067		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295		285,000		275,000		

Capital Projects Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2540 - Operation and Maintenance of Plant Services								
320 Property Services	125,338	18,854		-		-		
380 Non-Instructional Professional and Technical Services	28,372	35,509		-		-		
460 Non-Consumable Items	-	2,478		-		-		
540 Depreciable Equipment	-	5,410		148,914		-		
590 Other Capital Outlay	-	695,537		-		139,161		
640 Dues and Fees	-	8,440		-		-		
Total Operation and Maintenance of Plant Services	153,711	766,228		148,914		139,161		
Total Support Services	153,711	766,228		148,914		139,161		
5100 - Debt Service								
610 Redemption of Principal	40,682	42,077		98,164		102,384		
621 Regular Interest	22,386	20,990		37,922		33,455		
Total Debt Service	63,067	63,067		136,086		135,839		
Total Other Uses	63,067	63,067		136,086		135,839		
TOTAL REQUIREMENTS	216,778	829,295	-	285,000	-	275,000		

Internal Service Fund

The Internal Service Fund accounts for the operation of district functions that provide goods or services to other district functions, other districts, or to other governmental units, on a cost-reimbursable basis. This includes the Equipment Replacement Fund and the Technology Replacement Fund.



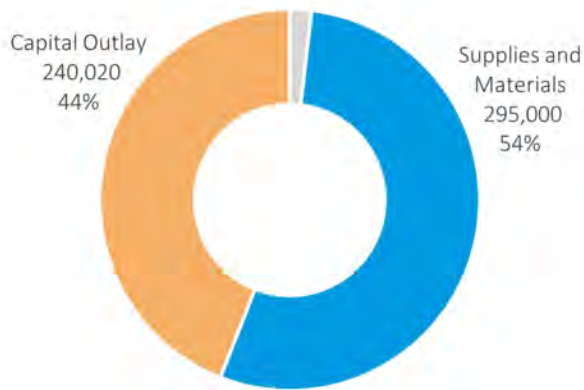
MedSplash is an annual summer camp for health sciences that provides students with hands-on experience with medical equipment while learning about high wage and in-demand health careers and exploring health pathways at Lane Community College.

Internal Service Fund

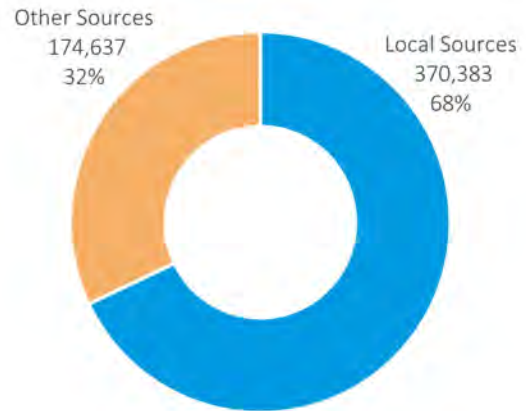
Summary of Resources and Requirements

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
Resources								
1000 Local Sources	294,659	278,832		252,600		370,383		
5000 Other Sources	484,071	418,074		182,426		174,637		
Total Resources	778,730	696,906		435,026		545,020		
Requirements								
300 Purchased Services	-	7,658		-		10,000		
400 Supplies and Materials	195,815	153,508		270,000		295,000		
500 Capital Outlay	164,841	401,270		165,026		240,020		
Total Requirements	360,656	562,436		435,026		545,020		
ENDING FUND BALANCE	418,074	134,470		-		-		

Resources



Requirements



Internal Service Fund

Resources by Source

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
1000 - Revenue from Local Sources								
1960 Recovery of Prior Years' Expenditure	-	-		-		107,783		
1970 Services Provided Other Funds	294,659	278,832		252,600		262,600		
Total Revenue from State Sources	294,659	278,832		252,600		370,383		
5000 - Revenue from Other Sources								
5300 Sale of/or Compensation for Loss of Fixed Assets	4,092	-		-		-		
5400 Beginning Fund Balance	479,979	418,074		182,426		174,637		
Total Revenue from Other Sources	484,071	418,074		182,426		174,637		
TOTAL RESOURCES	778,730	696,906		435,026		545,020		

Internal Service Fund

Requirements by Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
300 - Purchased Services								
380 Non-Instructional Professional and Technical Services	-	7,658		-		10,000		
Total Purchased Services		7,658				10,000		
400 - Supplies and Materials								
460 Non-Consumable Items	918	595		10,000		-		
470 Computer Software	828	-		10,000		-		
480 Computer Hardware	194,068	152,913		250,000		295,000		
Total Supplies and Materials	195,815	153,508		270,000		295,000		
500 - Capital Outlay								
540 Depreciable Equipment	164,841	176,879		165,026		200,020		
590 Other Capital Outlay	-	224,391		-		40,000		
Total Capital Outlay	164,841	401,270		165,026		240,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Internal Service Fund

Requirements by Function

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2000 - Support Services								
2540 Operation and Maintenance of Plant Services	120,686	397,249		165,026		250,020		
2570 Internal Services	44,155	-		-		-		
2660 Technology Services	195,815	153,508		270,000		295,000		
2690 Other Support Services - Central	-	11,679		-		-		
Total Support Services	360,656	562,436		435,026		545,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Internal Service Fund

Requirements by Function / Object

	2022-23 Actual	2023-24 Actual	2024-25		2025-26 Budget			
			FTE	Budget	FTE	Proposed	Approved	Adopted
2540 - Operation and Maintenance of Plant Services								
380 Non-Instructional Professional and Technical Services	-	7,658		-		10,000		
540 Depreciable Equipment	120,686	165,200		165,026		200,020		
590 Other Capital Outlay	-	224,391		-		40,000		
Total Operation and Maintenance of Plant Services	120,686	397,249		165,026		250,020	-	-
2570 - Internal Services								
540 Depreciable Equipment	44,155	-		-		-		
Total Internal Services	44,155	-		-		-		
2660 - Technology Services								
460 Non-Consumable Items	918	595		10,000		-		
470 Computer Software	828	-		10,000		-		
480 Computer Hardware	194,068	152,913		250,000		295,000		
Total Technology Services	195,815	153,508		270,000		295,000		
2690 - Other Support Services - Central								
540 Depreciable Equipment	-	11,679		-		-		
Total Other Support Services - Central	-	11,679		-		-		
Total Support Services	360,656	562,436		435,026		545,020		
TOTAL REQUIREMENTS	360,656	562,436		435,026		545,020		

Other Information



Friends and Fun Camp provided Life Skills students with opportunities to experience swimming, music, art, science, and other social activities specifically tailored to meet their unique needs.

Summary of Staffing (FTE)

	2024-25 Budget			2025-26 Proposed		
	100	200	All	100	200	All
	General Fund	Special Revenue Fund	Total	General Fund	Special Revenue Fund	Total
Licensed Staff						
111 Classroom Teacher	29.00	5.00	34.00	31.00	4.00	35.00
111 Special Education Consultant or Specialist	11.13	10.40	21.53	7.60	14.10	21.70
111 Speech Language Pathologist	8.20	-	8.20	15.30	0.50	15.80
111 School Psychologist	0.63	-	0.63	2.80	-	2.80
111 School Improvement Specialist	2.00	16.83	18.83	4.00	11.50	15.50
111 School Counselor	-	-	-	0.50	0.50	1.00
111 School Nurse	0.63	-	0.63	2.80	-	2.80
Total Licensed Staff	51.58	32.23	83.81	64.00	30.60	94.60
Classified Staff						
112 Instructional Assistant	118.94	-	118.94	116.69	-	116.69
112 Custodian	1.50	-	1.50	1.50	-	1.50
112 Courier Driver	1.00	-	1.00	0.80	-	0.80
112 Maintenance Technician	1.00	-	1.00	1.00	-	1.00
112 Program Assistant	3.60	5.28	8.88	4.00	3.35	7.35
112 Desktop Support Technician	-	1.00	1.00	1.00	-	1.00
112 Human Resources Specialist	1.00	-	1.00	2.00	-	2.00
112 Accounting Specialist	2.00	-	2.00	2.00	-	2.00
112 Program Facilitator, Navigator or Coordinator	-	13.00	13.00	-	12.73	12.73
112 Early Childhood Parent Educator	-	1.00	1.00	-	1.00	1.00
112 Systems Administrator	2.00	-	2.00	2.00	-	2.00
112 Database Administrator	1.00	-	1.00	1.00	-	1.00
112 Systems Engineer	2.00	-	2.00	2.00	-	2.00
112 Cybersecurity Engineer	1.00	-	1.00	1.00	-	1.00
112 Interpreter	-	26.94	26.94	-	27.00	27.00
Total Classified Staff	135.04	47.22	182.26	134.99	44.08	179.06
Administrative Staff						
113 Facilities Manager	1.00	-	1.00	1.00	-	1.00
113 Program Administrator	5.27	4.03	9.30	3.60	2.40	6.00
113 Assistant Director	-	-	-	-	1.00	1.00
113 Executive Director	4.58	1.42	6.00	4.80	1.20	6.00
113 Assistant Superintendent	1.00	-	1.00	1.00	-	1.00
113 Superintendent	1.00	-	1.00	1.00	-	1.00
Total Administrative Staff	12.85	5.45	18.30	11.40	4.60	16.00
Managerial - Classified Staff						
114 Payroll Specialist	1.00	-	1.00	1.00	-	1.00
114 Office Manager	2.48	0.53	3.00	1.90	0.10	2.00
114 Human Resources Analyst	2.00	-	2.00	1.00	-	1.00
114 Executive Assistant	1.00	-	1.00	1.00	-	1.00
Total Managerial - Classified Staff	6.48	0.53	7.00	4.90	0.10	5.00
GRAND TOTAL	205.95	85.43	291.37	215.29	79.38	294.66

Service Orders

Summary

District	2024-25 ADMr	2024-25 Carryover	PD Carryover	High Cost Pool	2025-26 Allocation	2025-26 Available	Transit Cash	Total Services	Amount Due	Flex \$ Balance
Bethel	4,943.72	109,063	47,600	-	2,657,600	2,814,263	1,407,132	2,702,149	-	112,115
Blachly	402.79	-	5,502	-	221,900	227,402	-	256,718	(29,316)	-
Creswell	1,084.95	-	28,338	8,800	566,300	603,438	-	1,243,748	(640,310)	-
Crow-Applegate-Lorane	293.64	-	-	-	187,800	187,800	32,884	187,800	-	-
Eugene	15,687.49	-	315,601	-	8,049,950	8,365,551	1,541,823	8,365,551	-	-
Fern Ridge	1,390.10	-	4,628	-	717,600	722,228	150,743	722,228	-	-
Junction City	1,550.14	-	15,515	-	803,900	819,415	-	1,470,608	(651,193)	-
Lowell	1,044.35	284,618	33,200	-	558,500	876,318	438,159	607,910	-	268,408
Mapleton	136.59	-	3,400	-	124,400	127,800	46,843	127,800	-	-
Marcola	942.94	-	-	-	501,700	501,700	-	499,467	-	2,233
McKenzie	196.96	-	5,683	3,800	157,500	166,983	-	376,041	(209,058)	-
Oakridge	501.46	-	9,253	23,400	296,300	328,953	-	367,124	(38,171)	-
Pleasant Hill	932.36	-	27,806	-	483,800	511,606	112,422	511,606	-	-
Siuslaw	1,188.18	-	8,589	64,000	613,800	686,389	-	357,400	-	328,989
South Lane	2,635.87	266,587	13,668	-	1,456,400	1,736,655	280,888	1,736,655	-	-
Springfield	8,991.37	-	55,258	-	4,804,200	4,859,458	-	6,719,460	(1,860,002)	-
Charter Schools								13,300	(13,300)	-
Totals	41,922.91	660,268	574,041	100,000	22,201,650	23,535,959	4,010,894	26,265,564	(3,441,349)	711,745

Comparison

Life Skills Placements		Lane School Placements		Behavior Consultants		School Psychologists		Speech Language Pathologists		Augmentative Communication		Direction Service		Learn360		Career and Technical Ed		Library Services		Substitute Teacher List		Courier Services	
24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26	24-25	25-26
3	1	7	5	0.00	0.00	0.00	0.00	0.00	0.00	4	1	Y	Y	Y	Y	10	10	Y	Y	Y	Y	Y	Y
0	0	1	1	0.00	0.20	0.13	0.13	0.60	0.60	0	0	Y	Y	Y	N	1	2	Y	Y	Y	Y	Y	N
12	12	5	4	0.00	0.00	0.00	0.00	0.00	0.00	20	18	Y	Y	N	N	7	7	Y	Y	Y	Y	Y	Y
0	0	0	0	0.00	0.00	0.38	0.38	0.40	0.40	0	0	Y	N	Y	N	3	3	Y	Y	Y	N	N	N
68	63	10	4	0.00	0.00	0.00	0.00	0.00	0.00	1	1	Y	Y	N	N	25	22	N	N	N	N	Y	Y
8	6	1	1	0.00	0.00	0.00	0.00	0.00	0.00	5	5	Y	Y	Y	Y	3	3	Y	Y	Y	Y	Y	Y
7	3	5	5	0.60	0.60	0.00	0.00	0.70	2.00	7	8	Y	Y	N	N	5	6	Y	Y	N	N	Y	Y
2	2	0	0	0.00	0.00	0.00	0.00	0.00	0.00	2	0	Y	Y	N	N	2	2	Y	Y	Y	Y	Y	Y
0	0	0	0	0.00	0.00	0.00	0.00	0.50	0.50	0	0	Y	Y	Y	N	1	1	Y	Y	Y	N	N	N
2	2	1	0	0.10	0.10	0.00	0.70	0.50	1.00	1	1	Y	Y	Y	Y	4	3	Y	Y	Y	Y	N	N
0	0	0	0	0.00	0.00	0.13	0.13	0.50	0.50	1	1	Y	Y	N	N	4	4	Y	Y	Y	Y	Y	Y
0	0	1	1	0.00	0.00	0.38	0.38	1.00	1.00	5	5	Y	Y	Y	Y	5	6	Y	Y	Y	Y	Y	Y
3	3	2	2	0.00	0.00	0.00	0.10	0.00	0.00	5	4	Y	Y	N	N	2	2	Y	Y	Y	Y	N	N
0	0	0	0	0.00	0.00	1.00	1.00	1.00	1.00	5	0	Y	N	N	N	8	8	N	N	N	N	Y	Y
12	13	5	6	0.00	0.00	0.00	0.00	0.00	0.00	22	20	Y	Y	N	N	11	11	N	N	Y	N	Y	Y
87	81	6	4	0.00	0.00	0.00	0.00	0.00	0.00	0	0	Y	Y	Y	Y	23	21	N	N	N	N	Y	Y
205	186	44	33	0.70	0.90	2.00	2.80	4.70	7.00	78	64	16	14	8	5	114	111	12	12	12	9	12	11

Service Orders

District Service Orders

Lane Education Service District 2025-26 Service Order Form

District:	Bethel	ADMr:	4,943.72
Total Flex Dollars Available		\$ 2,814,263	
2025-26 Flex Allocation		\$ 2,657,600	
2025-26 High Cost Pool (estimate)		\$ -	
2024-25 Flex Carryover (estimate)		\$ 109,063	
2024-25 Professional Development Carryover (estimate)		\$ 47,600	
Menu Services		Unit	Order
			Cost
			\$ 1,295,017
Life Skills Consortium Placements			1 \$ 73,000 \$ 73,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	1	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile	0		\$ 145,000 \$ -
Lane School Placements			5 \$ 65,500 \$ 327,500
Lane School: Grades K-2	1	Students	\$ -
Lane School: Grades 3-5	1	Students	\$ -
Lane School: Grades 6-8	3	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	1	\$ 4,000 \$ 4,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 10,629
Sign Language Interpretation Services	Dollars	\$ 800,000	\$ 800,000 \$ 800,000
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	Yes	\$ 0.80 \$ 3,955
Career and Technical Education	Programs	10	\$ 1,900 \$ 19,000
Library Services	ADMr	Yes	\$ 9.25 \$ 45,729
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 4,004
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services		\$ -	
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars		\$ 1,407,132	
Total Cost of Services Ordered		\$ 2,702,149	
		Flex Dollar Balance (Amount Due)	\$ 112,114

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Blachly		ADMr:	402.79	
Total Flex Dollars Available				\$ 227,402	
2025-26 Flex Allocation				\$	221,900
2025-26 High Cost Pool (estimate)				\$	-
2024-25 Flex Carryover (estimate)				\$	-
2024-25 Professional Development Carryover (estimate)				\$	5,502
Menu Services			Unit	Order	Cost
					\$ 256,718
Life Skills Consortium Placements				0	\$ 73,000 \$ -
Life Skills : Grades K-5			0	Students	
Life Skills : Grades 6-8			0	Students	
Life Skills : Grades 9-12			0	Students	
Life Skills : Transitions			0	Students	
Life Skills: Medically Fragile			0		\$ 145,000 \$ -
Lane School Placements				1	\$ 65,500 \$ 65,500
Lane School: Grades K-2			0	Students	\$ -
Lane School: Grades 3-5			1	Students	\$ -
Lane School: Grades 6-8			0	Students	\$ -
Behavior Disorder Consultants			FTE	0.20	\$ 165,000 \$ 33,000
School Psychologists			FTE	0.13	\$ 180,000 \$ 22,500
Speech Language Pathologists			FTE	0.60	\$ 155,000 \$ 93,000
Augmentative Communication			Students	0	\$ 4,000 \$ -
Direction Service			ADMr	Yes	\$ 2.15 \$ 866
Sign Language Interpretation Services			Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center			Dollars	\$ -	\$ - \$ -
Nursing Services			FTE	0.20	\$ 170,000 \$ 34,000
Application Hosting and Management: Learn360			ADMr	No	\$ 0.80 \$ -
Career and Technical Education			Programs	2	\$ 1,900 \$ 3,800
Library Services			ADMr	Yes	\$ 9.25 \$ 3,726
Substitute Teacher List Subscription			ADMr	Yes	\$ 0.81 \$ 326
Courier Services			District	No	\$ 7,200 \$ -
Custom Services					\$ -
Request #1					\$ -
Request #2					\$ -
Request #3					\$ -
Transit Dollars					\$ -
Total Cost of Services Ordered					\$ 256,718
					Flex Dollar Balance (Amount Due) \$ (29,316)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Creswell	ADMr:	1,084.95
Total Flex Dollars Available			\$ 603,438
2025-26 Flex Allocation			\$ 566,300
2025-26 High Cost Pool (estimate)			\$ 8,800
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 28,338
Menu Services	Unit	Order	Cost \$ 1,243,748
Life Skills Consortium Placements		12	\$ 73,000 \$ 876,000
Life Skills : Grades K-5	7	Students	
Life Skills : Grades 6-8	3	Students	
Life Skills : Grades 9-12	2	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		4	\$ 65,500 \$ 262,000
Lane School: Grades K-2	2	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	18	\$ 4,000 \$ 72,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 2,333
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	7	\$ 1,900 \$ 13,300
Library Services	ADMr	Yes	\$ 9.25 \$ 10,036
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 879
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 1,243,748
Flex Dollar Balance (Amount Due)			\$ (640,310)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Crow-Applegate-Lorane	ADM:	293.64
Total Flex Dollars Available			\$ 187,800
2025-26 Flex Allocation			\$ 187,800
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ -
Menu Services		Unit	Order
			Cost
			\$ 154,916
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			0 \$ 145,000 \$ -
Lane School Placements			0 \$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.38	\$ 180,000 \$ 67,500
Speech Language Pathologists	FTE	0.40	\$ 155,000 \$ 62,000
Augmentative Communication	Students	0	\$ 4,000 \$ -
Direction Service	ADM	No	\$ 2.15 \$ -
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.10	\$ 170,000 \$ 17,000
Application Hosting and Management: Learn360	ADM	No	\$ 0.80 \$ -
Career and Technical Education	Programs	3	\$ 1,900 \$ 5,700
Library Services	ADM	Yes	\$ 9.25 \$ 2,716
Substitute Teacher List Subscription	ADM	No	\$ 0.81 \$ -
Courier Services	District	No	\$ 7,200 \$ -
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 32,884
Total Cost of Services Ordered			\$ 187,800
Flex Dollar Balance (Amount Due)			\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Eugene	ADMr:	15,687.49
Total Flex Dollars Available		\$ 8,365,551	
2025-26 Flex Allocation		\$ 8,049,950	
2025-26 High Cost Pool (estimate)		\$ -	
2024-25 Flex Carryover (estimate)		\$ -	
2024-25 Professional Development Carryover (estimate)		\$ 315,601	
Menu Services	Unit	Order	Cost \$ 6,823,728
Life Skills Consortium Placements		55	\$ 73,000 \$ 4,015,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	22	Students	
Life Skills : Grades 9-12	25	Students	
Life Skills : Transitions	8	Students	
Life Skills: Medically Fragile		8	\$ 145,000 \$ 1,160,000
Lane School Placements		4	\$ 65,500 \$ 262,000
Lane School: Grades K-2	1	Students	\$ -
Lane School: Grades 3-5	1	Students	\$ -
Lane School: Grades 6-8	2	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	1	\$ 4,000 \$ 4,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 33,728
Sign Language Interpretation Services	Dollars	\$ 1,300,000	\$ 1,300,000 \$ 1,300,000
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	22	\$ 1,900 \$ 41,800
Library Services	ADMr	No	\$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 1,541,823
Total Cost of Services Ordered			\$ 8,365,551
Flex Dollar Balance (Amount Due)		\$	-

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Fern Ridge	ADMr:	1,390.10
Total Flex Dollars Available			\$ 722,228
2025-26 Flex Allocation			\$ 717,600
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 4,628
Menu Services		Unit	Order
			Cost
			\$ 571,485
Life Skills Consortium Placements			6
			\$ 73,000
			\$ 438,000
Life Skills : Grades K-5	1	Students	
Life Skills : Grades 6-8	3	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	2	Students	
Life Skills: Medically Fragile			0
			\$ 145,000
			\$ -
Lane School Placements			1
			\$ 65,500
			\$ 65,500
Lane School: Grades K-2	0	Students	
			\$ -
Lane School: Grades 3-5	0	Students	
			\$ -
Lane School: Grades 6-8	1	Students	
			\$ -
Behavior Disorder Consultants		FTE	0.00
			\$ 165,000
			\$ -
School Psychologists		FTE	0.00
			\$ 180,000
			\$ -
Speech Language Pathologists		FTE	0.00
			\$ 155,000
			\$ -
Augmentative Communication		Students	5
			\$ 4,000
			\$ 20,000
Direction Service		ADMr	Yes
			\$ 2.15
			\$ 2,989
Sign Language Interpretation Services		Dollars	\$ -
			\$ -
			\$ -
MLK Jr. Education Center		Dollars	\$ -
			\$ -
			\$ -
Nursing Services		FTE	0.10
			\$ 170,000
			\$ 17,000
Application Hosting and Management: Learn360		ADMr	Yes
			\$ 0.80
			\$ 1,112
Career and Technical Education		Programs	3
			\$ 1,900
			\$ 5,700
Library Services		ADMr	Yes
			\$ 9.25
			\$ 12,858
Substitute Teacher List Subscription		ADMr	Yes
			\$ 0.81
			\$ 1,126
Courier Services		District	Yes
			\$ 7,200
			\$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 150,743
Total Cost of Services Ordered			\$ 722,228
Flex Dollar Balance (Amount Due)			\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Junction City	ADMr:	1,550.14
Total Flex Dollars Available			\$ 819,415
2025-26 Flex Allocation			\$ 803,900
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 15,515
Menu Services		Unit	Order
			Cost
			\$ 1,215,772
Life Skills Consortium Placements			2 \$ 73,000 \$ 146,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	1	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	1	Students	
Life Skills: Medically Fragile		1	\$ 145,000 \$ 145,000
Lane School Placements			5 \$ 65,500 \$ 327,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	3	Students	\$ -
Behavior Disorder Consultants	FTE	0.60	\$ 165,000 \$ 99,000
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	2.00	\$ 155,000 \$ 310,000
Augmentative Communication	Students	8	\$ 4,000 \$ 32,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 3,333
Sign Language Interpretation Services	Dollars	\$ 120,000	\$ 120,000 \$ 120,000
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	6	\$ 1,900 \$ 11,400
Library Services	ADMr	Yes	\$ 9.25 \$ 14,339
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ 254,836
Request #1	SANDI (30 students)		\$ -
Request #2	ISP for 1 student		\$ 254,836
Request #3	Inclusion/Life Skills consultation (.1 FTE?)		\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 1,470,608
		Flex Dollar Balance (Amount Due)	\$ (651,193)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Lowell	ADMr:	1,044.35
Total Flex Dollars Available			\$ 876,318
2025-26 Flex Allocation			\$ 558,500
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ 284,618
2024-25 Professional Development Carryover (estimate)			\$ 33,200
Menu Services		Unit	Order
			Cost
			\$ 169,751
Life Skills Consortium Placements		2	\$ 73,000 \$ 146,000
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	2	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		0	\$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.00	\$ 180,000 \$ -
Speech Language Pathologists	FTE	0.00	\$ 155,000 \$ -
Augmentative Communication	Students	0	\$ 4,000 \$ -
Direction Service	ADMr	Yes	\$ 2.15 \$ 2,245
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	2	\$ 1,900 \$ 3,800
Library Services	ADMr	Yes	\$ 9.25 \$ 9,660
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 846
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 438,159
Total Cost of Services Ordered			\$ 607,910
		Flex Dollar Balance (Amount Due)	\$ 268,408

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Mapleton		ADMr:	136.59	
Total Flex Dollars Available					
2025-26 Flex Allocation				\$	127,800
2025-26 High Cost Pool (estimate)				\$	-
2024-25 Flex Carryover (estimate)				\$	-
2024-25 Professional Development Carryover (estimate)				\$	3,400
Menu Services					
	Unit	Order	Cost	\$	80,957
Life Skills Consortium Placements		0	\$ 73,000	\$	-
Life Skills : Grades K-5	0	Students			
Life Skills : Grades 6-8	0	Students			
Life Skills : Grades 9-12	0	Students			
Life Skills : Transitions	0	Students			
Life Skills: Medically Fragile		0	\$ 145,000	\$	-
Lane School Placements		0	\$ 65,500	\$	-
Lane School: Grades K-2	0	Students		\$	-
Lane School: Grades 3-5	0	Students		\$	-
Lane School: Grades 6-8	0	Students		\$	-
Behavior Disorder Consultants	FTE	0.00	\$ 165,000	\$	-
School Psychologists	FTE	0.00	\$ 180,000	\$	-
Speech Language Pathologists	FTE	0.50	\$ 155,000	\$	77,500
Augmentative Communication	Students	0	\$ 4,000	\$	-
Direction Service	ADMr	Yes	\$ 2.15	\$	294
Sign Language Interpretation Services	Dollars	\$ -	\$ -	\$	-
MLK Jr. Education Center	Dollars	\$ -	\$ -	\$	-
Nursing Services	FTE	0.00	\$ 170,000	\$	-
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80	\$	-
Career and Technical Education	Programs	1	\$ 1,900	\$	1,900
Library Services	ADMr	Yes	\$ 9.25	\$	1,263
Substitute Teacher List Subscription	ADMr	No	\$ 0.81	\$	-
Courier Services	District	No	\$ 7,200	\$	-
Custom Services					
Request #1					\$ -
Request #2					\$ -
Request #3					\$ -
Transit Dollars					\$ 46,843
Total Cost of Services Ordered					\$ 127,800
Flex Dollar Balance (Amount Due)					\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Marcola			ADMr:	942.94	
Total Flex Dollars Available					\$ 501,700	
2025-26 Flex Allocation					\$	501,700
2025-26 High Cost Pool (estimate)					\$	-
2024-25 Flex Carryover (estimate)					\$	-
2024-25 Professional Development Carryover (estimate)					\$	-
Menu Services				Unit	Order	Cost
						\$ 499,467
Life Skills Consortium Placements					2	\$ 73,000 \$ 146,000
Life Skills : Grades K-5				0	Students	
Life Skills : Grades 6-8				1	Students	
Life Skills : Grades 9-12				1	Students	
Life Skills : Transitions				0	Students	
Life Skills: Medically Fragile				0		\$ 145,000 \$ -
Lane School Placements				0		\$ 65,500 \$ -
Lane School: Grades K-2				0	Students	\$ -
Lane School: Grades 3-5				0	Students	\$ -
Lane School: Grades 6-8				0	Students	\$ -
Behavior Disorder Consultants				FTE	0.10	\$ 165,000 \$ 16,500
School Psychologists				FTE	0.70	\$ 180,000 \$ 126,000
Speech Language Pathologists				FTE	1.00	\$ 155,000 \$ 155,000
Augmentative Communication				Students	1	\$ 4,000 \$ 4,000
Direction Service				ADMr	Yes	\$ 2.15 \$ 2,027
Sign Language Interpretation Services				Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center				Dollars	\$ -	\$ - \$ -
Nursing Services				FTE	0.20	\$ 170,000 \$ 34,000
Application Hosting and Management: Learn360				ADMr	Yes	\$ 0.80 \$ 754
Career and Technical Education				Programs	3	\$ 1,900 \$ 5,700
Library Services				ADMr	Yes	\$ 9.25 \$ 8,722
Substitute Teacher List Subscription				ADMr	Yes	\$ 0.81 \$ 764
Courier Services				District	No	\$ 7,200 \$ -
Custom Services						\$ -
Request #1	Teacher of Record, .5					\$ -
Request #2	Assistive Tech, .2					\$ -
Request #3						\$ -
Transit Dollars						\$ -
Total Cost of Services Ordered						\$ 499,467
				Flex Dollar Balance (Amount Due)		\$ 2,233

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	McKenzie	ADMr:	196.96
Total Flex Dollars Available			\$ 166,983
2025-26 Flex Allocation			\$ 157,500
2025-26 High Cost Pool (estimate)			\$ 3,800
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 5,683
Menu Services		Unit	Order
		Cost	\$ 121,205
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			0 \$ 145,000 \$ -
Lane School Placements			0 \$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	0.13	\$ 180,000 \$ 22,500
Speech Language Pathologists	FTE	0.50	\$ 155,000 \$ 77,500
Augmentative Communication	Students	1	\$ 4,000 \$ 4,000
Direction Service	ADMr	Yes	\$ 2.15 \$ 423
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	4	\$ 1,900 \$ 7,600
Library Services	ADMr	Yes	\$ 9.25 \$ 1,822
Substitute Teacher List Subscription	ADMr	Yes	\$ 0.81 \$ 160
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ 254,836
Request #1	Intensive services Prog. one student- Fox Hollow		\$ 254,836
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 376,041
		Flex Dollar Balance (Amount Due)	\$ (209,058)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Oakridge	ADMr:	501.46
Total Flex Dollars Available			\$ 328,953
2025-26 Flex Allocation			\$ 296,300
2025-26 High Cost Pool (estimate)			\$ 23,400
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 9,253
Menu Services		Unit	Order
		Cost	\$ 367,124
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			0 \$ 145,000 \$ -
Lane School Placements			1 \$ 65,500 \$ 65,500
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	1	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.38 \$ 180,000 \$ 67,500
Speech Language Pathologists	FTE		1.00 \$ 155,000 \$ 155,000
Augmentative Communication	Students		5 \$ 4,000 \$ 20,000
Direction Service	ADMr		Yes \$ 2.15 \$ 1,078
Sign Language Interpretation Services	Dollars		\$ - \$ - \$ -
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.20 \$ 170,000 \$ 34,000
Application Hosting and Management: Learn360	ADMr		Yes \$ 0.80 \$ 401
Career and Technical Education	Programs		6 \$ 1,900 \$ 11,400
Library Services	ADMr		Yes \$ 9.25 \$ 4,639
Substitute Teacher List Subscription	ADMr		Yes \$ 0.81 \$ 406
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 367,124
		Flex Dollar Balance (Amount Due)	\$ (38,171)

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Pleasant Hill			ADMr:	932.36	
Total Flex Dollars Available					\$ 511,606	
2025-26 Flex Allocation					\$	483,800
2025-26 High Cost Pool (estimate)					\$	-
2024-25 Flex Carryover (estimate)					\$	-
2024-25 Professional Development Carryover (estimate)					\$	27,806
Menu Services				Unit	Order	Cost
						\$ 399,184
Life Skills Consortium Placements					3	\$ 73,000 \$ 219,000
Life Skills : Grades K-5				0	Students	
Life Skills : Grades 6-8				0	Students	
Life Skills : Grades 9-12				1	Students	
Life Skills : Transitions				2	Students	
Life Skills: Medically Fragile				0		\$ 145,000 \$ -
Lane School Placements					2	\$ 65,500 \$ 131,000
Lane School: Grades K-2				0	Students	\$ -
Lane School: Grades 3-5				1	Students	\$ -
Lane School: Grades 6-8				1	Students	\$ -
Behavior Disorder Consultants				FTE	0.00	\$ 165,000 \$ -
School Psychologists				FTE	0.10	\$ 180,000 \$ 18,000
Speech Language Pathologists				FTE	0.00	\$ 155,000 \$ -
Augmentative Communication				Students	4	\$ 4,000 \$ 16,000
Direction Service				ADMr	Yes	\$ 2.15 \$ 2,005
Sign Language Interpretation Services				Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center				Dollars	\$ -	\$ - \$ -
Nursing Services				FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360				ADMr	No	\$ 0.80 \$ -
Career and Technical Education				Programs	2	\$ 1,900 \$ 3,800
Library Services				ADMr	Yes	\$ 9.25 \$ 8,624
Substitute Teacher List Subscription				ADMr	Yes	\$ 0.81 \$ 755
Courier Services				District	No	\$ 7,200 \$ -
Custom Services						\$ -
Request #1						\$ -
Request #2						\$ -
Request #3						\$ -
Transit Dollars						\$ 112,422
Total Cost of Services Ordered						\$ 511,606
Flex Dollar Balance (Amount Due)						\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Siuslaw	ADMr:	1,188.18
Total Flex Dollars Available			\$ 686,389
2025-26 Flex Allocation			\$ 613,800
2025-26 High Cost Pool (estimate)			\$ 64,000
2024-25 Flex Carryover (estimate)			\$ -
2024-25 Professional Development Carryover (estimate)			\$ 8,589
Menu Services		Unit	Order
		Cost	\$ 357,400
Life Skills Consortium Placements			0 \$ 73,000 \$ -
Life Skills : Grades K-5	0	Students	
Life Skills : Grades 6-8	0	Students	
Life Skills : Grades 9-12	0	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		0	\$ 65,500 \$ -
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	0	Students	\$ -
Lane School: Grades 6-8	0	Students	\$ -
Behavior Disorder Consultants	FTE	0.00	\$ 165,000 \$ -
School Psychologists	FTE	1.00	\$ 180,000 \$ 180,000
Speech Language Pathologists	FTE	1.00	\$ 155,000 \$ 155,000
Augmentative Communication	Students	0	\$ 4,000 \$ -
Direction Service	ADMr	No	\$ 2.15 \$ -
Sign Language Interpretation Services	Dollars	\$ -	\$ - \$ -
MLK Jr. Education Center	Dollars	\$ -	\$ - \$ -
Nursing Services	FTE	0.00	\$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr	No	\$ 0.80 \$ -
Career and Technical Education	Programs	8	\$ 1,900 \$ 15,200
Library Services	ADMr	No	\$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr	No	\$ 0.81 \$ -
Courier Services	District	Yes	\$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ -
Total Cost of Services Ordered			\$ 357,400
		Flex Dollar Balance (Amount Due)	\$ 328,989

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	South Lane	ADMr:	2,635.87
Total Flex Dollars Available			\$ 1,736,655
2025-26 Flex Allocation			\$ 1,456,400
2025-26 High Cost Pool (estimate)			\$ -
2024-25 Flex Carryover (estimate)			\$ 266,587
2024-25 Professional Development Carryover (estimate)			\$ 13,668
Menu Services		Unit	Order
			Cost
			\$ 1,455,767
Life Skills Consortium Placements			13
	Life Skills : Grades K-5	9	Students
	Life Skills : Grades 6-8	0	Students
	Life Skills : Grades 9-12	2	Students
	Life Skills : Transitions	2	Students
Life Skills: Medically Fragile		0	\$ 145,000 \$ -
Lane School Placements		6	\$ 65,500 \$ 393,000
	Lane School: Grades K-2	1	Students \$ -
	Lane School: Grades 3-5	2	Students \$ -
	Lane School: Grades 6-8	3	Students \$ -
Behavior Disorder Consultants		FTE	0.00 \$ 165,000 \$ -
School Psychologists		FTE	0.00 \$ 180,000 \$ -
Speech Language Pathologists		FTE	0.00 \$ 155,000 \$ -
Augmentative Communication		Students	20 \$ 4,000 \$ 80,000
Direction Service		ADMr	Yes \$ 2.15 \$ 5,667
Sign Language Interpretation Services		Dollars	\$ - \$ - \$ -
MLK Jr. Education Center		Dollars	\$ - \$ - \$ -
Nursing Services		FTE	0.00 \$ 170,000 \$ -
Application Hosting and Management: Learn360		ADMr	No \$ 0.80 \$ -
Career and Technical Education		Programs	11 \$ 1,900 \$ 20,900
Library Services		ADMr	No \$ 9.25 \$ -
Substitute Teacher List Subscription		ADMr	No \$ 0.81 \$ -
Courier Services		District	Yes \$ 7,200 \$ 7,200
Custom Services			\$ -
Request #1			\$ -
Request #2			\$ -
Request #3			\$ -
Transit Dollars			\$ 280,888
Total Cost of Services Ordered			\$ 1,736,655
Flex Dollar Balance (Amount Due)			\$ -

Service Orders

District Service Orders (continued)

Lane Education Service District 2025-26 Service Order Form

District:	Springfield	ADMr:	8,991.37
Total Flex Dollars Available		\$ 4,859,458	
2025-26 Flex Allocation		\$ 4,804,200	
2025-26 High Cost Pool (estimate)		\$ -	
2024-25 Flex Carryover (estimate)		\$ -	
2024-25 Professional Development Carryover (estimate)		\$ 55,258	
Menu Services		Unit	Order Cost \$ 6,464,624
Life Skills Consortium Placements			78 \$ 73,000 \$ 5,694,000
Life Skills : Grades K-5	40	Students	
Life Skills : Grades 6-8	17	Students	
Life Skills : Grades 9-12	21	Students	
Life Skills : Transitions	0	Students	
Life Skills: Medically Fragile			3 \$ 145,000 \$ 435,000
Lane School Placements			4 \$ 65,500 \$ 262,000
Lane School: Grades K-2	0	Students	\$ -
Lane School: Grades 3-5	2	Students	\$ -
Lane School: Grades 6-8	2	Students	\$ -
Behavior Disorder Consultants	FTE		0.00 \$ 165,000 \$ -
School Psychologists	FTE		0.00 \$ 180,000 \$ -
Speech Language Pathologists	FTE		0.00 \$ 155,000 \$ -
Augmentative Communication	Students		0 \$ 4,000 \$ -
Direction Service	ADMr		Yes \$ 2.15 \$ 19,331
Sign Language Interpretation Services	Dollars		\$ - \$ - \$ -
MLK Jr. Education Center	Dollars		\$ - \$ - \$ -
Nursing Services	FTE		0.00 \$ 170,000 \$ -
Application Hosting and Management: Learn360	ADMr		Yes \$ 0.80 \$ 7,193
Career and Technical Education	Programs		21 \$ 1,900 \$ 39,900
Library Services	ADMr		No \$ 9.25 \$ -
Substitute Teacher List Subscription	ADMr		No \$ 0.81 \$ -
Courier Services	District		Yes \$ 7,200 \$ 7,200
Custom Services		\$ 254,836	
Request #1	One Slot for ISP		\$ 254,836
Request #2			\$ -
Request #3			\$ -
Transit Dollars		\$ -	
Total Cost of Services Ordered		\$ 6,719,460	
Flex Dollar Balance (Amount Due)		\$(1,860,002)	

Acronyms

AAC	Augmentative and Alternative Communication	ELL (ESL)	English Language Learning (also referred to as ESL or English as a Second Language)
ADA	Americans with Disabilities Act	ESD	Education Service District
ADM	Average Daily Membership - the average number of enrolled students of an educational unit.	FTE	Full-Time Equivalent
ADMr	Average Daily Membership (Resident) - the ADM of the students who live in the district, regardless of where they attend.	GAAP	Generally Accepted Accounting Principles
ADMw	Average Daily Membership (Weighted) - the ADMr increased by a variety of weighting factors to obtain weighted average daily membership.	GASB	Governmental Accounting Standards Board
ASD	Autism Spectrum Disorder	GYO	Grown Your Own
ASIST	Applied Suicide Intervention Skills Training	IDEA	Individuals with Disabilities Education Act
AT	Assistive Technology	IEP	Individualized Education Plan
CLC	Connected Lane County	JDEP	Juvenile Detention Education Program
COLA	Cost of Living Adjustment	LEA	Local Education Agency
CPS	Collaborative Problem Solving	LES D	Lane Education Service District
CTE	Career and Technical Education	LSP	Local Service Plan
DHH	Deaf or Hard-of-Hearing	MEP	Migrant Education Program
EC CARES	Early Childhood Coordination Agency for Referrals, Evaluations and Services	MLK	Martin Luther King Jr. Education Center
EI/ECSE	Early Intervention and Early Childhood Special Education	OAR	Oregon Administrative Rule
		ODE	Oregon Department of Education
		OI	Orthopedic Impairments
		ORS	Oregon Revised Statutes



OT/PT	Occupational Therapy and Physical Therapy	SIA	Student Investment Account
PBAM	Program Budgeting and Accounting Manual	SSA	Student Success Act
PBIS	Positive Behavior and Instructional Supports	SLP	Speech Language Pathologist
PERS	Public Employees Retirement System	SSF	State School Fund
RBT	Research for Better Teaching	SSPS	School Safety and Prevention System
RIS	Regional Inclusive Services	STEM	Science, Technology, Engineering and Math
RTAP	Regional Technical Assistance Program	TBI	Traumatic Brain Injury
SEL	Social Emotional Learning	VI	Vision Impaired
SERBU	John Serbu Youth Campus and Juvenile Justice Center	WREN	Western Regional Educator Network

Glossary of Terms

Account Codes

Account codes identify the funding source and nature of budget expenditures.

Accounting Systems

The total structure of records and procedures which discover, record, classify, summarize, and report information on the financial position of a governmental entity.

Accrual Basis

The basis of accounting under which transactions are recognized when they occur.

Adopted Budget

The financial plan adopted by the Board which forms a basis for expenditure appropriations.

Allocations

To divide an appropriation into amounts for specific purposes.

Appropriations

A legal authorization granted by the school board to make expenditures and to incur obligations for specific purposes.

Assets

Governmental resources with monetary value.

Beginning Fund Balance

Funds carried forward from the previous fiscal year that become a resource to support the appropriations for the next budgeted fiscal year.

Behavior Intervention

A therapeutic school environment focused on teaching students skills for success across all settings: academic, social, emotional, family and community.

Bond

A type of debt security for a specific sum of money to be repaid at a fixed time in the future, and carrying interest at a fixed rate, usually payable periodically.

Budgetary Control

The management of the district in accordance with an approved budget for the purpose of keeping expenditures within the limitations of available appropriations and available revenues.

Capital Projects Fund

Accounts for resources, usually bond sale proceeds, used for activities related to the purchase or construction of major capital assets, i.e., a new school or major building renovations.

Classified Staff

Employees in positions that are classified according to the duties and responsibilities involved in the work and do not require licensing by the Teacher Standards and Practices Commission as a condition of employment.

Component Districts

Districts served by the ESD.

Contingency

A special amount budgeted each year for unforeseen expenditures. Transfer of general fund operating contingency funds to cover unanticipated expenditures requires board approval.

Cost Center

A subdivision of the district that is charged with carrying on one or more specific purposes such as a department or special program.


County School Fund

Distributed by ESD sources and includes property tax levy, state forest fees, and various fines such as gambling fees.

Debt Service Fund

A fund established to account for payment of general long-term debt principal and interest.

Deficit

The excess of the liabilities of a fund over its assets. Oregon school districts may not carry deficits in any fund.

Ending Fund Balance

Funds remaining after the fiscal year is closed and all expenditures and revenues are accounted for. The ending fund balance of the current fiscal year becomes the beginning fund balance of the next fiscal year.

E-Rate

E-Rate is a Federal program, created by the Federal Communication Commission (FCC) and administered by the Universal Service Administrative Company (USAC) that subsidizes Internet and Telecom services for schools and libraries.

Fiscal Year

The 12 month operating year for the District, beginning on July 1 and ending on June 30 of the following year.

Fixed Assets

Assets of a long term character which are intended to continue to be held or used, such as land, buildings, machinery and equipment.

Function

A group of related activities aimed at accomplishing a major service or regulatory program for which a government is responsible.

Fund

A fiscal and accounting entity with a self-balancing set of accounts.

General Fund

A fund used to account for most operating activities except those activities required to be accounted for in another fund.

Grant

A donation or contribution in cash which may be made to support a specified purpose or function, or general purpose.

Licensed Staff

All licensed teachers, counselors, special education teachers, and other certified teaching staff under contract to the District. Also included in this group are child development specialists, student resource specialists, physical therapists, and occupational therapists.

Levy

Amount or rate of ad valorem tax certified by a local government for the support of governmental activities.

Measure 5

Property tax limitation passed by Oregon's voters in November 1990, limiting local property taxes for schools to \$5 per \$1,000 of assessed value.


Modified Accrual

The basis of accounting in which revenue is recorded when available and measurable.

Object

For fund accounting this term identifies and classifies the articles purchased or the service obtained.

Proposed Budget

Financial and operating plan for the district that the Superintendent is recommending to the public and budget committee.

Requirement

An expenditure or net decrease to a fund's resources.

Resolution

A formal order of a governing body.

Resources

Estimated beginning fund balances plus all anticipated revenues.

Revenue

Monies received or anticipated by a local government from either tax or non-tax sources.

Special Revenue Fund

A fund used to account for proceeds of specific revenue sources that are restricted to expenditures for specific purposes.

Supplemental Budget

A financial plan prepared after the regular budget has been adopted to meet unexpected needs or to spend revenues not anticipated when the regular budget was adopted.

Taxes

Compulsory charges levied by the District for the purpose of financing the operation of schools.

Transfers

Amounts distributed from one fund to finance activities in another fund. Interfund transfers require Board approval.

Transit

Funds transferred from the ESD to component district.





HUMAN RESOURCES REPORT TO LANE ESD BOARD

June 1, 2025

CLASSIFIED STAFF (Information)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>	14181	Instructional Assistant, Fox Hollow ISP	5/6/2025	
	14180	Instructional Assistant, Life Skills	5/6/2025	
	14177	Instructional Assistant, Life Skills	4/29/2025	
	14176	Program Assistant, School Improvement	4/28/2025	
	14179	Instructional Assistant, At-Large	5/1/2025	
	14178	Instructional Assistant, Life Skills	4/29/2025	
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>	13611	Desktop Support Technician	6/6/2025	Resignation
	13920	Sign Language Interpreter, Trainee	6/16/2025	Layoff
	14097	Sign Language Interpreter, Trainee	6/16/2025	Layoff
	14013	Sign Language Interpreter, Trainee	6/12/2025	Layoff
	13977	Sign Language Interpreter, Trainee	6/16/2025	Layoff
<i>Change of Status</i>				

LICENSED STAFF (Action)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>	13896	Teacher, Special Education, Consultant	6/12/2025	Layoff
	12595	Teacher, Special Education, Lane School	6/12/2025	Layoff
	14093	Teacher, Special Education, DHH	6/16/2025	Layoff
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>	13694	Project Coordinator, SI/WREN	5/29/2025	Resignation
<i>Change of Status</i>				

PROFESSIONAL STAFF (Information)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>				
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>				
<i>Change of Status</i>				

MANAGEMENT STAFF (Action)

	Employee ID #	Position	Effective Date	Notes
<i>Appointments</i>	13870	Program Administrator	6/30/2025	Layoff
<i>Leaves of Absence</i>				
<i>Discontinuation of Employment</i>				
<i>Change of Status</i>				

VACANCY NOTICES (Information)			
Posting #	Position	Closing Date	Notes
1139	Instructional Assistant, Special Education (Candidate Pool for the 2025-26 School Year)	5/19/2025	
1143	Summer Camp School Nurse, Special Education (Temporary)	5/30/2025	
1138	School Nurse, Special Education (Candidate Pool for the 2025-26 School Year)		Open
1144	Human Resources Specialist and Substitute Coordinator	5/30/2025	
1123	Graduation Specialist II		Open
1108	School Psychologist (Candidate Pool for the 2025-26 School Year)	6/27/2025	
1114	Speech Language Pathologist (Candidate Pool for the 2025-26 School Year)	6/27/2025	
966	Speech Language Pathologist (Rural)		Open
1113	Teacher, Life Skills (Candidate Pool for the 2025-26 School Year)	6/27/2025	
1111	Teacher, Vision Impaired (Candidate Pool for the 2025-26 School Year)	6/27/2025	
745	Education Instructional Assistant, Substitute		Open
545	Special Education, Substitute Teacher		Open



LANE EDUCATION SERVICE DISTRICT

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Eugene, OR 97402

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EQUITY COMMITMENT LEADERSHIP COLLABORATION INTEGRITY

Prepared for: Lane ESD Board of Directors
Prepared by: Olivia Meyers Buch, Executive Director of Business Services
Meeting Date: June 3, 2025

April 2025 Financial Report (Unaudited)

General Fund Financial Report

The Financial Report for the General Fund for the period ending April 30, 2025 follows this report. Year-to-date operating revenues through April 30, 2025 total \$25,074,071 or 87.2% of total budgeted operating revenues as compared to \$23,973,219 or 85.4% through April 30, 2024. As usual, state school fund formula revenue (state school fund - general support and property taxes) constitute the majority of funds received. Total projected resources of \$32,108,082 is \$734,603 more than budgeted.

Year-to-date operating expenditures through April 30, 2025 total \$17,822,908 or 69.7% of total budgeted operating expenditures as compared to \$16,371,653 or 66.8% through April 30, 2024. Total projected operating expenditures of \$25,049,338 is \$511,312 less than budgeted. Total projected transfers and transits of \$3,814,753 is \$67,766 more than budgeted.

Projected resources and requirements through June 30, 2025 result in an ending fund balance of \$3,243,992, with \$1,236,977 assigned (reserved) for districts. The remaining ending fund balance of \$2,007,015 is unassigned and represents 6.8% of projected operating revenues. The projected ending fund balance reflects an increase, or operating surplus, of \$534,012.

Appropriations

A summary of appropriations for all funds for the period ending April 30, 2025 follows this report. Two appropriations are currently overspent. The appropriation for Support Services in the Capital Projects Fund (Equipment Replacement Fund) is overspent by \$247, pending a budget transfer from the Debt Service appropriation. The appropriation for Instruction in the Internal Service Fund is overspent by \$53,800 (related to replacement of Smart Boards at Lane School), pending a budget transfer from the Support Services appropriation.

Two other appropriations are projected to be overspent. The appropriation for Apportionment of Funds by ESD in the General Fund is projected to be overspent by \$67,766, pending a budget transfer from the Instruction appropriation. The appropriation for Enterprise and Community Services in the Special Revenue Fund (Food Service Fund) is projected to be overspent by \$5,632, pending a budget transfer from the Support Services appropriation.

Cash and Investment Account Balances by Type

	Yield	Beginning Balance	Deposits	Withdrawals	Ending Balance
Municipal Investor Checking	0.35%	\$519,366	\$3,018,804	\$3,047,641	\$490,529
Oregon LGIP (4513)	4.60%	\$7,916,866	\$1,339,908	\$1,200,000	\$8,056,774
Oregon LGIP (3676)	4.60%	\$768,875	\$86,501	\$0	\$855,376
Total		\$9,205,107	\$4,445,213	4,247,641	\$9,402,679

Assurances

All cash, investment and credit card accounts have been balanced, reconciled and reviewed and all cash and investment accounts have been reconciled to the general ledger as of April 30, 2025.

The adopted budget reflects expected expenditures. All payroll reports have been filed and payroll liabilities have been paid timely. All federal and state reimbursement requests as well as required financial reporting forms have been filed timely. All credit card expenditures, travel and other reimbursements have been reviewed and approved at the proper level.

There have been no significant changes to the internal control system, to the accounting system or accounting policies that are significant. The business services department is adequately staffed to allow for proper segregation of duties and I am not aware of any new pronouncements or other financial changes that may require additional staff time to properly implement.

All financial statements that have been provided to the board are accurate and complete to the best of my knowledge and I am aware of no other financial matters that the board should be aware of at this time. I know of no cases of fraud or other misconduct and I have not been asked by the superintendent to do anything that makes me feel uncomfortable or to present any information I feel is inaccurate.

Please contact me with questions or if you would like any additional information.

LANE EDUCATION SERVICE DISTRICT
General Fund Financial Report (Unaudited)
For the Period Ending April 30, 2025

	Fiscal Year 2023-24					Fiscal Year 2024-25					
	Amended Budget	Actuals thru 4/30/2024	% of Budget	Actuals thru 6/30/2024	% of Budget	Adopted Budget	Actuals thru 4/30/2025	% of Budget	Projected thru 6/30/2025	% of Budget	Budget Variance
RESOURCES											
State School Fund Formula Revenue											
State School Fund - General Support	\$ 15,532,800	\$ 14,546,261	93.6%	\$ 15,996,395	103.0%	\$ 16,240,313	\$ 15,055,619	92.7%	\$ 16,547,846	101.9%	\$ 307,533
Property Taxes Levied by District	8,688,000	8,423,723	97.0%	8,611,369	99.1%	9,038,376	8,760,103	96.9%	9,028,082	99.9%	(10,294)
Other Local Revenues	66,200	35,802	54.1%	87,771	132.6%	86,659	19,947	23.0%	30,000	34.6%	(56,659)
Services Provided to Districts	2,550,400	13,330	0.5%	1,256,511	49.3% ⁽¹⁾	2,209,514	120,487	5.5%	2,179,854	98.7%	(29,660)
Fees Charged to Grants	670,000	397,628	59.3%	812,985	121.3%	600,000	467,788	78.0%	675,000	112.5%	75,000
Other Revenues	577,700	556,476	96.3%	765,427	132.5%	580,000	650,127	112.1%	937,321	161.6%	357,321
Total Operating Revenues	\$ 28,085,100	\$ 23,973,219	85.4%	\$ 27,530,458	98.0%	\$ 28,754,862	\$ 25,074,071	87.2%	\$ 29,398,103	102.2%	\$ 643,241
Beginning Fund Balance (District Reserves)	921,200	1,165,894	126.6%	1,165,894	126.6%	1,103,757	1,286,636	116.6%	1,286,636	116.6%	182,879
Beginning Fund Balance	2,050,000	2,080,746	101.5%	2,080,746	101.5%	1,514,860	1,423,343	94.0%	1,423,343	94.0%	(91,517)
TOTAL RESOURCES	\$ 31,056,300	\$ 27,219,859	87.6%	\$ 30,777,098	99.1%	\$ 31,373,479	\$ 27,784,050	88.6%	\$ 32,108,082	102.3%	\$ 734,603
REQUIREMENTS											
Salaries	\$ 10,981,145	\$ 8,139,920	74.1%	\$ 10,973,743	99.9%	\$ 11,436,471	\$ 8,206,529	71.8%	\$ 11,313,041	98.9%	\$ (123,430)
Associated Payroll Costs	7,372,689	4,885,811	66.3%	6,470,402	87.8% ⁽²⁾	7,495,703	4,884,822	65.2%	6,920,927	92.3%	(574,776) ⁽²⁾
Purchased Services	5,490,697	2,595,386	47.3%	5,713,478	104.1%	5,695,892	3,936,650	69.1%	5,801,088	101.8%	105,196
Supplies and Materials	446,550	500,954	112.2%	599,614	134.3%	662,884	452,100	68.2%	627,431	94.7%	(35,453)
Other Objects	230,100	249,583	108.5%	263,685	114.6%	269,700	342,808	127.1%	386,852	143.4%	117,152
Total Operating Expenditures	\$ 24,521,181	\$ 16,371,653	66.8%	\$ 24,020,922	98.0%	\$ 25,560,650	\$ 17,822,908	69.7%	\$ 25,049,338	98.0%	\$ (511,312)
Transfers											
Interfund Transfers	459,000	429,000	93.5%	448,198	97.6%	449,000	429,000	95.5%	449,000	100.0%	-
Transits to Districts	4,110,163	882,847	21.5%	3,597,999	87.5%	3,297,987	1,551,175	47.0%	3,365,753	102.1%	67,766
Other Uses of Funds											
Planned Reserve (District Reserves)	965,956	-	0.0%	-	0.0%	464,161	-	0.0%	-	0.0%	(464,161)
Planned Reserve	400,000	-	0.0%	-	0.0%	801,681	-	0.0%	-	0.0%	(801,681)
Reserved for Next Year	600,000	-	0.0%	-	0.0%	800,000	-	0.0%	-	0.0%	(800,000)
TOTAL REQUIREMENTS	\$ 31,056,300	\$ 17,683,500	56.9%	\$ 28,067,119	90.4%	\$ 31,373,479	\$ 19,803,083	63.1%	\$ 28,864,091	92.0%	\$ (2,509,388)
ENDING FUND BALANCE	-	\$ 9,536,359		\$ 2,709,979		-	\$ 7,980,967		\$ 3,243,992		
Assigned for Districts				\$ 1,286,636					\$ 1,236,977		
Unassigned Fund Balance				\$ 1,423,343	5.2% *				\$ 2,007,015	6.8% *	
<i>* Percent of Operating Revenues</i>				\$ 2,709,979					\$ 3,243,992		

(1) Variance is due to actual services ordered by districts being less than anticipated.

(2) Variance is due to savings as a result of implementing new opt out incentive that has resulted in lower health insurance premium costs.

LANE EDUCATION SERVICE DISTRICT
Appropriation Monitoring
For the Period Ending April 30, 2025

Fiscal Year 2024-25

		Adopted Budget	Actuals thru 4/30/2025	% of Budget	Projected thru 6/30/2025	% of Budget	BUDGET VARIANCE	NOTES
GENERAL FUND	100							
Instruction		13,292,681	8,636,104	65.0%	12,900,937	97.1%	391,745	+
Support Services		12,267,969	9,186,804	74.9%	12,148,401	99.0%	119,568	+
Transfers of Funds		449,000	429,000	95.5%	449,000	100.0%	-	+
Apportionment of Funds by ESD		3,297,987	1,551,175	47.0%	3,365,753	102.1%	(67,766)	- Pending Appropriation Transfer
Contingencies		1,265,842	-	0.0%	-	0.0%	1,265,842	+
Unappropriated Ending Fund Balance		800,000	-	0.0%	-	0.0%	800,000	
Total		31,373,479	19,803,083	63.1%	28,864,091	92.0%	2,509,388	+
SPECIAL REVENUE FUND	200							
Instruction		3,252,835	2,128,533	65.4%	3,250,000	99.9%	2,835	+
Support Services		14,531,841	11,135,455	76.6%	14,000,000	96.3%	531,841	+
Enterprise and Community Services		75,000	64,657	86.2%	91,243	121.7%	(16,243)	- Pending Appropriation Transfer
Transfers of Funds		2,500	-	0.0%	2,500	100.0%	-	+
Apportionment of Funds by ESD		22,102,824	16,684,734	75.5%	22,000,000	99.5%	102,824	+
Total		39,965,000	30,013,379	75.1%	39,343,743	98.4%	621,257	+
DEBT SERVICE FUND	300							
Support Services		30	0	1.3%	1	4.7%	29	+
Debt Service		916,825	83,412	9.1%	916,825	100.0%	-	+
Total		916,855	83,413	9.1%	916,826	100.0%	29	+
CAPITAL PROJECTS FUND	400							
Support Services		148,914	149,161	100.2%	149,161	100.2%	(247)	- Pending Appropriation Transfer
Debt Service		136,086	63,067	46.3%	135,838	99.8%	248	+
Total		285,000	212,229	74.5%	285,000	100.0%	0	+
INTERNAL SERVICE FUND	600							
Instruction		-	53,800	#DIV/0!	53,800	#DIV/0!	(53,800)	- Pending Appropriation Transfer
Support Services		435,026	273,954	63.0%	381,226	87.6%	53,800	+
Total		435,026	327,754	75.3%	435,026	100.0%	0	+
GRAND TOTAL	ALL	72,975,360	50,439,858	297.1%	30,500,943	41.8%	3,130,674	

Lane Education Service District
Resolution

**Transfer of Appropriations
General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund**

WHEREAS, ORS 294.463 provides for a governing body to transfer appropriations within a fund for the fiscal year;

AND WHEREAS, the appropriations made by the Board for the General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund require adjustment to acknowledge that projected actual expenditures may exceed the amounts appropriated by the Board.

BE IT RESOLVED, that the Board of the Lane Education Service District hereby transfers 2024-25 budget appropriations in the General Fund, Special Revenue Fund, Capital Projects Fund, and Internal Service Fund as follows:

<u>100 General Fund</u>	<u>As Adopted</u>	<u>Proposed</u>	<u>Change</u>
Requirements			
1000 Instruction	\$ 13,292,681	\$ 13,142,681	\$ (150,000)
2000 Support Services	12,267,969	12,267,969	-
5000 Other Uses	3,297,987	3,447,987	150,000
5200 Transfers of Funds	449,000	449,000	-
6000 Contingencies	1,265,842	1,265,842	-
7000 Unappropriated Ending Fund Balance	800,000	800,000	-
Total	\$ 31,373,479	\$ 31,373,479	\$ -

<u>200 Special Revenue Fund</u>	<u>As Adopted</u>	<u>Proposed</u>	<u>Change</u>
Requirements			
1000 Instruction	\$ 3,252,835	\$ 3,252,835	\$ -
2000 Support Services	14,531,841	14,511,841	(20,000)
3000 Enterprise and Community Services	75,000	95,000	20,000
5000 Other Uses	22,102,824	22,102,824	-

5200 Transfers of Funds	2,500	2,500	-
Total	\$ 39,965,000	\$ 39,965,000	\$ -

400 Capital Projects Fund	As Adopted	Proposed	Change
2000 Support Services	\$ 148,914	149,162	248
5100 Debt Service	136,086	135,838	(248)
Total	\$ 285,000	\$ 285,000	\$ -

600 Internal Service Fund	As Adopted	Proposed	Change
Requirements			
1000 Instruction	\$ -	\$ 53,800	\$ 53,800
2000 Support Services	435,026	381,226	(53,800)
Total	\$ 435,026	\$ 435,026	\$ -

The above resolution statements were approved and declared adopted on this 3rd day of June, 2025.

**LANE EDUCATION SERVICE DISTRICT
LANE COUNTY, OREGON**

Sherry Duerst-Higgins, Board Chair

ATTEST:

Tony Scurto, Clerk

Lane Education Service District

RESOLUTION ADOPTING THE BUDGET

BE IT RESOLVED that the Board of the Lane Education Service District hereby adopts the budget for fiscal year 2025-26 in the total of **\$79,368,711**. This budget is now on file at the Lane ESD Main Campus at 1200 Highway 99 N, Eugene, OR 97402.

RESOLUTION MAKING APPROPRIATIONS

BE IT RESOLVED that the amounts for the fiscal year beginning July 1, 2025, and for the purposes shown below are hereby appropriated:

100 - General Fund

1000 - Instruction	\$ 14,163,749
2000 - Support Services	14,928,394
5000 - Other Uses	4,010,894
5200 - Interfund Transfers	452,500
6000 - Contingency	650,000
Total	\$ 34,205,537

200 - Special Revenue Fund

1000 - Instruction	\$ 3,739,197
2000 - Support Services	15,187,528
3000 - Enterprise and Community Services	80,000
5000 - Other Uses	22,548,273
Total	\$ 41,554,998

300 - Debt Service Fund

2000 - Support Services	\$ 5
5100 - Debt Service	954,698
Total	\$ 954,703

400 - Capital Projects Fund

2000 - Support Services	\$ 139,161
5100 - Debt Service	135,839
Total	\$ 275,000

600 - Internal Service Fund

2000 - Support Services	\$	545,020
Total	\$	545,020

Total Appropriations, All Funds \$ 77,535,258

Total Unappropriated and Reserve Amounts, All Funds \$ 1,833,453

TOTAL ADOPTED BUDGET \$ 79,368,711

RESOLUTION IMPOSING THE TAX

BE IT RESOLVED, that the following ad valorem property taxes are hereby imposed for tax year 2024-2025 upon the assessed value of all taxable property within the district:

(1) At the rate of \$0.2232 per \$1,000 of assessed value for permanent rate tax;

RESOLUTION CATEGORIZING THE TAX

BE IT RESOLVED that the taxes imposed are hereby categorized for purposes of Article XI section 11b as:

Education Limitation

Permanent Rate Tax.....\$0.2232/\$1,000

The above resolution statements were approved and declared adopted on this 3rd day of June, 2025.

**LANE EDUCATION SERVICE DISTRICT
LANE COUNTY, OREGON**

Sherry Duerst-Higgins, Board Chair

ATTEST:

Tony Scurto, Clerk

Migrant Education Summer School

Response Summary:

Has this proposal been discussed and supported by your department's executive director?

Yes

Details

Project Name Summer Learning Grant

Department Submitting Proposal School Improvement

Person Submitting Proposal Ana Quintero-Arias

Potential Funder (please include link to RFP if available) ODE

Requested Funding Amount 60,000

Person who will manage grant if funded Ana Quintero-Arias

Grant Period

Length of grant June-August 2025

Anticipated start date (mm/dd/yyyy) 06/01/2025

Anticipated end date (mm/dd/yyyy) 08/31/2025

Is a match required from Lane ESD or participating districts (direct funds, FTE, services)?

No

Does the grant require any commitment from the ESD or districts beyond the term of the grant?

No

Does the grant require a 501(c)3 to apply?

No

Does the grant require "reporting" and/or updates?

Yes

What kind of reporting is being asked for?

Student survey and pre/post literacy assessment

Who will be doing the ongoing reporting (programmatic and fiscal responsibilities) within your department?

Ana Quintero-Arias

Have you discussed the data collection and reporting needs with your data coordinator?

Yes

With which data coordinator did you speak?

Coordinator X

When did you speak with your data coordinator about this project?

Daily

How often will you need their support for reporting, exports, and imports?

End of summer

Please, provide a brief overview of the grant, including the purpose and intended outcomes.

This grant is designed to accelerate learning and increase academic growth, with a particular emphasis on

advancing literacy as a statewide priority for the 2025-2027 biennium. Striving to do more than merely fill

learning gaps, these programs seek to transform summer into a time of deep learning through enriching

educational experiences that transcend the limitations of a traditional summer school model.

The 2025 State

Summer Learning Grants are centered on three fundamental goals for summer programs:

1. Advance academic learning aligned with Oregon content standards adopted under ORS 329.045,

focused on evidence-based literacy instruction, and inclusive of mathematics, science, and language

arts. Credit recovery and grade-level transition programming may also be provided when appropriate.

2. Support youth development through well-rounded enrichment opportunities that include hands-on,

inquiry-based, and project-based learning experiences that are intentionally integrated with evidencebased instruction to reinforce academic growth and promote students' mental, emotional, and social

well-being.

3. Ensure equitable access, outreach, and family engagement using culturally and linguistically responsive

strategies that support student success and build meaningful family partnerships.

State Summer Learning Grant Program Parameters 5

All aspects of these grants are centered around meeting these three key requirements.

Applicants must outline

their strategies for fulfilling these criteria and subsequently report on their success in achieving them at the

conclusion of the program. Additionally, partners of grantees are expected to demonstrate their role in

supporting the grantees to meet these essential requirements.

Describe how this proposal supports the equity vision and mission of Lane ESD. Vision: Building a beloved community of learners. Mission: Collaborating to empower all learners with justice-centered opportunities, equitable leadership, and a passion for lifelong learning.

This program is designed to meet the specific and unique needs of migrant children and their families through the direct feedback of students and families. Some of the direct program components that have resulted from past parent feedback are as follows. First, every classroom has a multilingual educator. Students are able to communicate in their chosen language, hear their name spoken correctly, and know their families can communicate with teachers as well. Students have pride in speaking their chosen language. The program and its staff encourages multilingualism. Some students come to summer school being primarily English speakers and experience the acceptance and value of being multilingual. Second, we annually bring teachers from Mexico to provide authentic, engaging, beautiful, culturally celebratory lessons and activities to ensure students have opportunities to value and respect Latin cultures. Students learn that they come from greatness! Students float with pride because their language, skin color, whole person is celebrated. Students experience teachers who are authentically themselves and deliver lessons that encourage students to do the same. Through this, a different kind of instructional relationship with students is developed. Third, our Mercado (end of summer showcase/celebration) allows families, component district staff, and various stakeholders to learn about the work the students did through a student-led process. Students also learn songs and dances that celebrate their culture and perform for their families and peers. Each year, the participation has grown for our Mercado and last year we had over 550 individuals attend.

Indicate which of Lane ESD's Equity Goals this proposal will directly address.

1. All decisions and actions will reflect the guiding principles and affirmations in our Equity Lens document.
2. Lane ESD staff along with community partners will be equity leaders trained to dismantle systems of oppression through interrupting inequitable policies and practices by providing culturally specific curriculum that reflects the histories of our students.
4. Youth, from all backgrounds, will have access to highly engaging and culturally relevant learning opportunities connected to our communities and delivered by diverse, qualified, and passionate educators.
5. While amplifying youth voice, we will build trusted and inclusive relationships with our families and elevate the engagement of community partners that lead to improved equitable student outcomes.

Describe how the voices of diverse members of the community have been part of the design and implementation process of this proposal.

MEP holds regular meetings with the Parent Advisory Committee (PAC) and our general parent group to request input on the development of and feedback on our summer school. Students also participate during summer school (survey) and during the school year in providing input regarding the programming of summer school experiences.

How will this proposal dismantle systems of racism and oppression that might exist?

Our program is committed to the philosophy of Rightful Presence (Calabrese Barton & Tan, 2022). This means, beyond “including” students experiencing disabilities we are designed for students with different abilities. Our curriculum centers the individual student, their identity and their ability to make choices about engagement and production. This is an authentic implementation of the principles of Universal Design for Learning (UDL). Through deliberate and on-going partnership with students' families and their home districts, we regularly communicate about individual needs and services that students benefit from. Additionally, our staff have access to the ongoing expertise, consultation and support of Lane ESD's robust special education department staff whose explicit mission is designing learning experiences around the principles of Rightful Presence.

Please note that while we do address IEP mandated modifications and accommodations as they are written, this need presents differently in our program, as our philosophy is rooted in meeting the unique cultural and academic needs of all students. Many of the modifications and accommodations presented are to account for access to the dominant culture of public school, which is a barrier we remove by the very nature of our program. Migrant education does not provide specially designed instruction. That is to say that if a student requires SDI and meets the district eligibility criteria for ESY, they attend their district program.

Calabrese Barton, A., & Tan, E. (2020). Beyond Equity as Inclusion: A Framework of “Rightful Presence” for Guiding Justice-Oriented Studies in Teaching and Learning. *Educational Researcher*, 49(6), 433–440.

Who might this proposal impact positively and who might it negatively impact?

All students eligible to come to MEP summer school will greatly benefit, along with all the staff that has the privilege to serve them. Who would be negatively impacted? Those not able to make it and be part of the MEP community.

How will you ensure that equitable outcomes are achieved and what data will be collected to measure success?

Our curriculum is specifically created for our migrant students. As such, we have also created curriculum based measures to accurately assess the present levels and growth of our students. We have a pre-post assessment to demonstrate growth in literacy and math.

Will the purchase of computers, software, or other equipment be required for staff hired or assigned to the grant?

No

What use of facilities are anticipated (workspace, training space, meeting space)? If applicable, please include use during weekends and break periods.

None- we will be off campus

What other internal supports at Lane ESD will you need for the project to succeed?

Tech set up and take down of wifi with Bethel SD, monitors and chromebooks at Fairfield elementary

Does the project involve research that requires the human subjects' releases?

No

Early Literacy Grant–Partnership with Eugene 4J

Response Summary:

Has this proposal been discussed and supported by your department's executive director?

Yes

Details

Project Name Early Literacy MEP

Department Submitting Proposal School Improvement

Person Submitting Proposal Ana Quintero-Arias

Potential Funder (please include link to RFP if available) ODE

Requested Funding Amount 377,202.00

Person who will manage grant if funded Ana

Grant Period

Length of grant 2 years

Anticipated start date (mm/dd/yyyy) 07/01/2025

Anticipated end date (mm/dd/yyyy) 06/30/2027

Is a match required from Lane ESD or participating districts (direct funds, FTE, services)?

No

Does the grant require any commitment from the ESD or districts beyond the term of the grant?

No

Does the grant require a 501(c)3 to apply?

No

Does the grant require "reporting" and/or updates?

Yes

What kind of reporting is being asked for?

Quarterly

Who will be doing the ongoing reporting (programmatic and fiscal responsibilities) within your department?

Ana

Have you discussed the data collection and reporting needs with your data coordinator?

Yes

With which data coordinator did you speak?

Coordinator X

When did you speak with your data coordinator about this project?

May 2025

How often will you need their support for reporting, exports, and imports?

Brandon will support with quarterly reports

Please, provide a brief overview of the grant, including the purpose and intended outcomes.

The proposal is submitted as a partnership between Eugene 4J and Lane Education Service District's (Lane ESD) Migrant Education Program to provide high dosage early literacy tutoring to MEP and Latinx students.

Describe how this proposal supports the equity vision and mission of Lane ESD. Vision: Building a beloved community of learners. Mission: Collaborating to empower all learners with justice-centered opportunities, equitable leadership, and a passion for lifelong learning.

In providing targets supports to our focal students, it is well aligned to our mission and vision.

Indicate which of Lane ESD's Equity Goals this proposal will directly address.

1. All decisions and actions will reflect the guiding principles and affirmations in our Equity Lens document.
2. Lane ESD staff along with community partners will be equity leaders trained to dismantle systems of oppression through interrupting inequitable policies and practices by providing culturally specific curriculum that reflects the histories of our students.
4. Youth, from all backgrounds, will have access to highly engaging and culturally relevant learning opportunities connected to our communities and delivered by diverse, qualified, and passionate educators.
5. While amplifying youth voice, we will build trusted and inclusive relationships with our families and elevate the engagement of community partners that lead to improved equitable student outcomes.

Describe how the voices of diverse members of the community have been part of the design and implementation process of this proposal.

MEP and Latinx families are critical to the design and implementation of all our programs and functions and will continue to be throughout this grant.

How will this proposal dismantle systems of racism and oppression that might exist?

It probably won't, but it will certainly provide needed supports to students who are marginalized and oppressed by our education system.

Who might this proposal impact positively and who might it negatively impact?

MEP and Latinx students and families. No negative impacts are foreseen.

How will you ensure that equitable outcomes are achieved and what data will be collected to measure success?

Early literacy data will be collected and used as the measure of success as required by the grant. AS with all our MEP program, we will center the voices of our students and families to measure our success.

Will the purchase of computers, software, or other equipment be required for staff hired or assigned to the grant?

No

What use of facilities are anticipated (workspace, training space, meeting space)? If applicable, please include use during weekends and break periods.

Unknown at this time. But likely meeting space will be used.

What other internal supports at Lane ESD will you need for the project to succeed?

School improvement team support.

Does the project involve research that requires the human subjects' releases?

No

LESD & LCEA
Tentative Agreements 2025 - 2027

On 4/30/25, the LANE EDUCATION SERVICE DISTRICT (LESD) and LANE COUNTY EDUCATION ASSOCIATION (LCEA) have reached a TENTATIVE AGREEMENT (TA) for the following information within this document.

On 4/2/25, the LESD and LCEA reached a TA for Article 16 - Insurance under section B for insurance cap allocations.

Article 16 - Insurance

B. The district will Increase tiered insurance cap allocations by 3.4% as follows.

	Employee Only	Employee + Spouse	Employee + Child(ren)	Employee + Spouse + Child(ren)
2025-2026	\$703	\$1,532	\$1,355	\$2,189
2026-2027	\$727	\$1,584	\$1,401	\$2,263

On 4/2/25, the LESD and LCEA reached a TA for Article 17 - Salaries and Wages for revising language in section 12.

Article 12 - Salaries and Wages

12. Bilingual employees of MEP and bilingual Desktop Technician will receive a 2% annual stipend based on their current salary.

On 4/10/25, the LESD and LCEA reached a TA for Article 16 to include the previous MOU for "Opt-Out" language in the Collective Bargaining Agreement.

Article 16 - Insurance

1. Employees who are eligible for benefits may "Opt-Out" of medical, dental and vision insurance coverage and receive a monthly financial incentive of \$500 from Lane ESD under the following conditions:

- The employee and their eligible dependents MUST have other employer-sponsored group coverage to "Opt-Out".
- Participation or enrollment in individual Marketplace Coverage, Oregon Health Plan, Medicaid, Veterans' Administration Benefit Programs, or Student Health insurance, does

NOT qualify for OEGBB "Opt-Out", therefore are not eligible to receive financial incentive.

- Employees who "Waive" are not eligible to receive financial incentive regardless of whether or not they have other medical coverage.
- The employee must provide proof of other equivalent group coverage within 5 business days of signing the "OptOut" form or the "Opt-Out" will not be in effect.

2. Employees who "Opt-Out" of medical coverage will not be eligible for Lane ESD's Employee Health Plan Monthly Premium Share,

3. Employees may elect to enroll themselves and their dependents in the following coverages at their own expense: Dental and/or Vision plus optional insurance such as additional Life insurance, additional Accidental Death and Dismemberment insurance, Long-Term Care insurance, or Short Term Disability.

4. Lane ESD will continue to provide Basic Life insurance, Accidental Death and Dismemberment insurance and Long-Term Disability insurance.

5. In the event of voluntary resignation or termination, the monthly "Opt-Out" financial incentive is subject to proration based on termination date (e.g. if employment ends on the 15th of the month, the employee would be eligible for 50% of the monthly incentive).

On 4/16/25, the LESD and LCEA reached a TA for Article 17 - Salaries and Wages.

Article 17 - Salaries and Wages

B. Wages

1. For the 2025-2026 and 2026-2027 school year, there will be an increase in work year salaries and wages for classified and licensed employees covered under this collective bargaining agreement.
2. Salary schedules will reflect a 3.5% increase in wages for 2025-2026 and 4% increase in wages for the 2026-2027 school year.

On 4/30/25, the LESD and LCEA reached a TA for Article 9 - Employee Evaluation, revising language in section 9, (D.).

Article 9 – Employee Evaluation

D. If the employee believes that any statements contained in the evaluation are unsubstantiated, they may dispute the matter with the department director or assistant Superintendent if the director is the evaluator. The decision may be appealed up to the Superintendent or designee. The clause is not subject to Article 7, (D. Step 4 & Step 5).

The LESD and LCEA bargaining teams reached a TA for ALL written items within this document on 4/30/25.

LCEA Bargaining Team	LESD Bargaining Team
Teagan Wynne Rhonda Brown Lory Boudreaux	Eric Anderson Morgan Christensen Olivia Meyers Buch

Signatures:

LCEA

Rhonda Brown 4/30/25
Date

Teagan Wynne 4/30/25
Date

Lory Boudreaux 4/30/25
Date

LESD

Eric Anderson 4/30/25
Date

Olivia Meyers Buch 4/30/25
Date

Morgan Christensen 4/30/25
Date

LESD and LCEA will continue to discuss and collaborate on the following articles and topics outside of bargaining.

- Article 18 - Vacancies & Transfers - Voluntary and Involuntary Transfer Process
- Article 10 - Work Schedule and Overtime - Lunches and Breaks
- Article 12 - Working Conditions - New Teacher Support and Mentorship Program

Lane Education Service District

Code: DA
Adopted: 6/27/00
Readopted: 12/11/01; 8/27/02
Orig. Code(s): DA

Fiscal Management Objectives

The Board recognizes its responsibility to the community for maintaining an educational program that meets the minimum standards set by law and providing such additional programs as are desired to meet educational goals in Lane ESD and component districts. The Board, however, also recognizes its responsibility to ensure that public monies expended by the ESD are utilized with prudence. Adequate constraints and records shall be established to ensure that end.

The Board by law holds the authority to fix the budget, levy taxes, approve bids, appropriate funds to the ESD and to set policies for the operation of the ESD.

To meet the goals of this policy, the Board requires the superintendent to:

1. Establish sound accounting procedures based upon program budgeting;
2. Institute effective business practices;
3. Review the financial operations annually and report to the Board on effectiveness and recommended improvements;
4. Make available fiscal procedures and responsibilities for Board review.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

Lane Education Service District

Code: DB
Adopted: 9/27/94
Revised/Readopted: 11/15/11
Orig. Code(s): DB

District Budget

The budget committee shall prepare and the Board shall adopt, a budget for operational and administrative expenses of the ESD.

The ESD budget will serve as the financial plan of operation for the ESD and will include estimates of expenditures for a given period and purpose, and the proposed means of financing the estimated expenditures. The ESD may provide that the budget and budget documents be prepared on an annual or biennial basis.

The ESD budget will be prepared in compliance with federal and state laws and regulations and locally adopted procedures. The superintendent will be designated as budget officer and they or a designee will prepare the budget document.

The Board will serve as the ESD's budget committee along with an equal number of electors plus one who are members of component district boards.

In appointing members, the Board will consider equitable representation of the component districts. Considerations shall include general location and size.

The term of appointment of a budget committee in an ESD that prepares an annual budget shall be three years. Appointive members of a budget committee in an ESD that prepares a biennial budget shall be appointed to four-year terms.

As budget officer the superintendent shall perform, or cause to have performed, the following:

1. Presentation of a budget calendar;
2. Preparation of the budget;
3. Presentation of the budget to the budget committee;
4. Preparation and submission of all resolutions for Board action as necessary to adopt the budget; to make the appropriations; to determine, make and declare the ad valorem property tax amount or rate to be certified to the assessor for the ensuing year; and to itemize and categorize the ad valorem property tax amount or rate as provided in Oregon Revised Statute (ORS) 310.060;
5. Preparation and filing of all necessary legal notices and reports required by the Local Budget Law.

The fiscal year will extend from July 1 to June 30 inclusive.

The Board will adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)
[ORS 328.542 to -328.745](#)

[ORS 334.240](#)
[OAR 581-024-0206\(3\)\(d\)](#)

[OAR 581-024-0260](#)
[OAR 581-024-0262](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DA
Adopted: 6/27/00
Readopted: 12/11/01; 8/27/02
Orig. Code(s): DA

Fiscal Management Objectives

The Board recognizes its responsibility to the community for maintaining an educational program that meets the minimum standards set by law and providing such additional programs as are desired to meet educational goals in Lane ESD and component districts. The Board, however, also recognizes its responsibility to ensure that public monies expended by the ESD are utilized with prudence. Adequate constraints and records shall be established to ensure that end.

The Board by law holds the authority to fix the budget, levy taxes, approve bids, appropriate funds to the ESD and to set policies for the operation of the ESD.

To meet the goals of this policy, the Board requires the superintendent to:

1. Establish sound accounting procedures based upon program budgeting;
2. Institute effective business practices;
3. Review the financial operations annually and report to the Board on effectiveness and recommended improvements;
4. Make available fiscal procedures and responsibilities for Board review.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

Lane Education Service District

Code: DBC
Adopted: 5/24/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBC

Budget Calendar

(Not a required policy)

The Board will annually adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

The superintendent will prepare and recommend a proposed calendar for Board approval. The calendar will identify dates and activities to include those needed to comply with state law.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

Lane Education Service District

Code: DBD
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBD

Budget Priorities

(Not a required policy)

The ESD ~~As the budget is prepared,~~ staff will use a prioritizing system consistent with program needs as identified by staff and the Board. Priorities should be established to be used as a basis for budget additions or reductions.

The budget committee will review suggested priorities and will either accept, modify or reject the priorities.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

Lane Education Service District

Code: DBC
Adopted: 5/24/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBC

Budget Calendar

(Not a required policy)

The Board will annually adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

The superintendent will prepare and recommend a proposed calendar for Board approval. The calendar will identify dates and activities to include those needed to comply with state law.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

Lane Education Service District

Code: DBC
Adopted: 5/24/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBC

Budget Calendar

(Not a required policy)

The Board will annually adopt a budget calendar which identifies dates and deadlines required for the legal presentation and adoption of the budget.

The superintendent will prepare and recommend a proposed calendar for Board approval. The calendar will identify dates and activities to include those needed to comply with state law.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

Lane Education Service District

Code: DBD
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBD

Budget Priorities

(Not a required policy)

The ESD ~~As the budget is prepared,~~ staff will use a prioritizing system consistent with program needs as identified by staff and the Board. Priorities should be established to be used as a basis for budget additions or reductions.

The budget committee will review suggested priorities and will either accept, modify or reject the priorities.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

Lane Education Service District

Code: DBE
Adopted: 5/24/94
Readopted: 12/11/01; 11/15/11
Orig. Code(s): DBE

Budget Preparation

The superintendent and budget committee have the responsibility for the budget preparation. The superintendent will develop such procedures necessary to ensure that the proposed ESD budget reflects all areas of the ESD's operation.

The superintendent and administrative staff will establish budget priorities for the ESD and will make appropriate recommendations related to those priorities to the Board and the budget committee.

The superintendent will deliver the completed budget document and budget message to the budget committee when they are ready for presentation.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 328.542 to -328.565](#)

[ORS 334.240](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

OR DEP'T OF REVENUE, LOCAL BUDGETING MANUAL.

Lane Education Service District

Code: DBEA
Adopted: 6/27/00
Revised/Readopted: 12/11/01; 8/27/02; 3/21/06
Orig. Code(s): DBEA

Budget Committee

By law, the budget committee is charged with preparing a budget for the operational and administrative expenses of the ESD. The budget committee will have the responsibility for reviewing the financial program of the ESD, reviewing the proposed ESD budget as presented by the superintendent and recommending an annual ESD budget in keeping with the provisions of applicable state laws.

Educational policy decisions are the responsibility of the Board, not the budget committee. The committee does not have the authority to add programs or to approve additional personnel or increase salaries. While the committee may, in effect, delete programs because of a fund decrease, the committee is charged primarily with fiscal evaluation of programs. The committee may, alternatively, set an amount that changes the recommended budget and may request the administration make such changes in accordance with priorities set by the Board.

The following will govern the make-up and process of establishing the ESD's budget committee:

1. The budget committee consists of the seven elected Board members and eight members appointed by the Board from component school district boards or designees of component district Boards. The members appointed by the Board shall consist of five members selected by ESD zone and three members selected at large. To be eligible for appointment, the appointive member must:
 - a. Live and be registered to vote within the ESD and, if a zone representative, must live within the appropriate zone;
 - b. Not be an officer, agent or employee of the ESD.
2. No budget committee member may receive any type of compensation from the ESD. Reimbursement of budget committee expenses shall be in accordance with Board policy and administrative regulation BHD/BHD-AR;
3. At its August meeting, the Board will identify vacant budget committee positions which must be filled by appointment of the Board. The Board will announce the vacancies and receive recommendations of interested members of component school district Boards or designees of component district boards. Candidates for vacant positions must reside in the vacated zone. At-large vacant positions will be filled from among members of component school district Boards or designees of component district boards;
4. At its September meeting, the Board will appoint budget committee members for three-year terms. The terms will be staggered so that approximately one-third of the appointive members' terms end each year. The Board may appoint budget committee members to as many consecutive terms as deemed appropriate. If any appointive member is unable to complete the term for which they were appointed, the Board will announce the vacancy at the first regular Board meeting following the

committee member's resignation or removal. An appointment to fill the position for its unexpired term will be made at the next regular Board meeting.

Budget Committee Responsibilities

The following items explain the budget committee responsibilities:

1. At its first meeting after appointment, the budget committee will elect a presiding officer from among its members. It may also establish other ground rules as necessary for successful operation of the committee;
2. A majority of the constituted committee is required for passing an action item. Majority for a 15-member committee is 8. Therefore, if only 8 members are present, a unanimous vote is needed for passing an action;
3. As provided by law, the committee will hear the budget message presented by the superintendent, receive the budget document, listen to comments and suggestions by patrons and announce the time and place for its future meetings. All meetings of the budget committee are open to the public;
4. The budget committee shall hold one or more meetings to receive the budget message, the budget document and to provide members of the public with an opportunity to ask questions about and comment on the budget document. The budget officer shall announce the time and place for all meetings, as provided by law. All meetings of the budget committee are open to the public. Minutes shall be taken, made available and retained in accordance with the Public Meetings Law;
5. The budget committee may request any information used in the preparation of or for revising the budget document from the superintendent or business manager. The committee may request the attendance of any employee at its meetings; such requests by the budget committee should be made through the superintendent and/or budget officer. The budget committee will approve the budget document as submitted by the superintendent or as subsequently revised by the committee;
6. After approval of the original or revised budget document, the budget committee's duties cease. The hearing on the approved budget is held by the Board.

END OF POLICY

Legal Reference(s):

[ORS 174.130](#)

[ORS 192.610 to -192.695](#)

[ORS 294.305 to -294.456](#)

[ORS 334.240](#)

[OAR 581-024-0262](#)

Lane Education Service District

Code: DBI
Adopted: 12/11/01
Orig. Code(s): DBI

Budget Amendment Procedures

The budget estimates and proposed ad valorem property tax amount or rate of any fund as shown in the budget document may be amended by the Board prior to adoption. Such amendment may also be made following adoption if the amendments are adopted prior to the commencement of the fiscal year to which the budget relates.

The amount of estimated expenditures for each fund in an annual budget shall not be increased by more than \$5,000 or 10 percent of the estimated expenditures, whichever is greater.

The ad valorem property tax amount or rate to be certified shall not exceed the amount approved by the budget committee, unless the amended budget document is republished and another public hearing is held as required by law.

END OF POLICY

Legal Reference(s):

[ORS 294.456](#)

[ORS 294.471](#)

[ORS 294.473](#)

Lane Education Service District

Code: DBJ
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DBJ

Budget Implementation

The ESD budget becomes the financial plan of Lane ESD for the ensuing budget period when adopted by the Board. The Board, through its superintendent, has authority and exercises control over all funds and expenditures of the ESD.

The superintendent and staff are authorized to make expenditures and commitments in accordance with the policies of the Board and the adopted ESD budget.

The superintendent will make the Board aware of any substantial changes in expected revenues or unusual expenditures so the Board may adjust the budget, if necessary.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS Chapter 310](#)

Lane Education Service District

Code: DBK
Adopted: 5/24/94
Revised/Readopted: 12/11/01; 7/13/10
Orig. Code(s): DBK

Budget Transfer Authority

The adopted ESD budget is a financial plan which may be subject to change as a result of circumstances or events occurring during the ensuing budget period. All appropriation transfers shall be authorized when completed by official resolution of the Board. The authorizing resolution must state the need for the transfer, its purpose and the amount of the transfer.

Transfers of general operating contingency appropriations which in aggregate during a fiscal year or budget period exceed 15 percent of the total appropriations of the fund may be made only after the adoption of a supplemental budget prepared for that purpose.

The superintendent has the authority to approve transfers between programs (i.e., elementary, middle school, high school) and/or object codes (i.e., 100-salaries, 200-benefits, 300-purchasing service, 400-supplies, etc.) within the same appropriation.

END OF POLICY

Legal Reference(s):

[ORS 294.450](#)463

Lane Education Service District

Code: DC
Adopted: 3/29/94
Readopted: 12/11/01
Orig. Code(s): DC

Borrowing Funds

The Board may authorize borrowing funds for the purpose of meeting current expenses and other legal expenditures when provision has been made for such expenditures in the adopted budget in accordance with Local Budget Law.

END OF POLICY

Legal Reference(s):

[ORS 294.443](#)

[ORS 328.565](#)

Lane Education Service District

Code: DD
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DD

Grant Funding Proposals and Applications

Lane ESD shall pursue federal, state or private grants or other such funds that will assist the ESD in meeting adopted Board and ESD goals.

Proposals for external funds will be submitted to the Board for evaluation and approval.

In the event an opportunity arises to submit a grant proposal and there is insufficient time to place it before the Board, the superintendent is authorized to use their judgment in approving it for submission. The superintendent will review the proposal with the Board at its next regular meeting. The Board reserves the right to reject funds associated with any grant which has been approved.

The Board shall, before an acceptance of such funds, consider the district's obligations, expectations or encumbrances when the grant ceases.

END OF POLICY

Legal Reference(s):

[ORS 294.305 to -294.565](#)

[ORS 334.125\(7\)](#)

Lane Education Service District

Code: DDA
Adopted: 12/11/01
Revised/Readopted: 2/28/06; 10/28/08
Orig. Code(s): DDA

Local Service Plan

The ESD will provide services to component school districts in accordance with a local service plan developed by the ESD and component school districts. The plan must be adopted by the Board and developed to meet the following ESD service goals:

1. Assist component school districts in meeting the requirements of state and federal law;
2. Improve student learning;
3. Enhance the quality of instruction provided to students;
4. Provide professional development to component school district employees;
5. Enable component school districts and district students to have equitable access to resources; and
6. Maximize operational and fiscal efficiencies for component school districts.

A local service plan must contain annual performance measures for the ESD. The local service plans must also include services as required by state and federal law, and in the following areas:

1. Students with Special Needs

The local service plan must include programs for children with special needs, including special education services and services for at-risk students, and professional development for employees who provide those services.

2. Technology Support

The plan shall include technology support for component school districts and individual technology plans for each district. The ESD will provide technology infrastructure services, data services, instructional technology services and distance learning, and professional development for employees who provide technology services.

3. School Improvement Services

The local service plan will include school improvement services for component school districts, including the following:

- a. Services designed to support component school districts in meeting the requirements of state and federal law;
- b. Services designed to allow the ESD to participate in and facilitate a review of the state and federal standards related to the provision of a quality education by component school districts;

- c. Services designed to support and facilitate continuous school improvement planning;
- d. Services designed to address school-wide behavior and climate issues;
- e. Services designed to support career technical education; and
- f. Professional development for employees who provide school improvement services.

4. Administrative and Support Services

Local service plans must include administrative and support services for component school districts, including services designed to consolidate component business functions, liaison services between the Department of Education and component school districts and registration of children being taught by private teachers, parents or legal guardians.

- 5. Other services required under ORS 339.005 - 339.090 or services designed to meet regional needs.
- 6. An ESD may provide entrepreneurial services and facilities to non-component school district and other public and private entities pursuant to ORS 334.185.

An ESD may provide the services required by the local service plan in cooperation with another ESD, with a school district or contract with a private or public entity for services.

Following the adoption by the ESD Board, local service plans shall be approved on or before March 1 by resolution of at least two-thirds of the eligible component school boards which have a majority of the students enrolled in the ESD.

Prior to June 30 of each year the ESD shall submit to the Department of Education the adopted local service plan of the ESD. The local service plan shall be part of the Annual Report submitted to the Department.

END OF POLICY

Legal Reference(s):

[ORS 334.005\(4\)](#)
[ORS 334.175](#)

[ORS 334.177](#)
[ORS 334.185](#)

[ORS 339.005 to-339.090](#)
[OAR 581-024-0285](#)

Lane Education Service District

Code: DFA
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DFA

Investment of Funds

The Board may authorize the investment or reinvestment of funds which are not immediately needed for the operation of Lane ESD. Such investments will comply with State law and Oregon Administrative Rules.

The superintendent and director of business services will develop criteria for the appropriate investments of ESD funds. A progress report of investments will be made to the Board on a regular basis.

END OF POLICY

Legal Reference(s):

[ORS 294.033](#)
[ORS 294.035](#)

[ORS 294.125](#)
[ORS 294.135](#)

[ORS 294.145](#)
[ORS 294.155](#)

Lane Education Service District

Code: DFA-AR
Adopted: 12/11/01
Revised/Readopted: 12/07/04; 2/28/06
Orig. Code(s): DFA-AR

Investment of Funds

These regulations are issued for the guidance of the portfolio manager in the day-to-day operation of the investment program.

These regulations apply to activities of the portfolio manager with regard to investing the financial assets of all excess funds of the ESD including the General Fund, Special Revenue Funds, Capital Project Funds, Internal Services Funds and any and all Trust and Agency Funds under the control and direction of the ESD.

The portfolio manager will routinely and actively monitor the contents of the investment portfolio, the available markets and the relative values of competing investments and will adjust the portfolio accordingly. The portfolio manager, acting in accordance with these procedures and exercising due diligence, shall not be held personally responsible for a specific security's credit risk or market price changes, provided that these deviations are reported as soon as practical and that appropriate action is taken to control adverse developments.

All investments will be carried at cost. Gains or losses from investments will be credited or charged to investment income at the time of sale. Premiums or discounts on securities may be amortized over the life of the security.

Diversification of Maturity

1. The ESD shall attempt, to the maximum extent possible, to match investment maturity schedules with anticipated cash flow requirements. In no event, unless specifically matched to specific requirements such as bond sinking funds or reserves, will the ESD invest in securities having a maturity more than 18 months from the date of purchase.
2. Investment maturities for operating funds shall be scheduled to coincide with projected cash flow needs.
3. In determining the amount of excess funds available for investment purposes, the portfolio manager will maintain cash flow projections and schedules as well as a historical record of expenditures and receipts. These forecasts and schedules will be reviewed and updated as required to reflect actual conditions as they exist.

Qualified Institutions for Investment Purchases

1. The ESD shall evaluate each financial institution (as used herein, the term is meant to include brokers/dealers) from whom it purchases investments as to financial soundness at least once annually. Investigation may include review of the most recent Consolidated Report of Condition ("call" report), rating reports, financial statements as well as analysis of the particular institution's management, profitability, capitalization and asset quality.
2. Any financial institution with whom the ESD wishes to do business shall provide financial data at the request of the portfolio manager. The information will be reviewed by the portfolio manager who will decide on the soundness of the institution before adding that institution to those that are on the

approved qualified institution list for the ESD. The ESD reserves the right to be selective and to add or delete institutions from the approved list at will.

3. The portfolio manager will maintain a qualified institution list. A financial institution must be on this approved list prior to transacting any business with the ESD. A basic requirement for inclusion on the approved listing is a capital adequacy ratio in excess of 120 percent (1.2 to 1).
4. All approved financial institutions must be chartered in Oregon and insured by the Federal Deposit Insurance Corporation (FDIC).
5. Brokers or dealers not affiliated with a bank shall have offices located in Oregon, be classified as reporting dealers affiliated with the New York Federal Reserve Bank as primary dealers, or be required to meet capital adequacy requirements.

Diversification of Instrument of Investment

1. The portfolio manager will diversify the investment portfolio to avoid incurring unreasonable risks inherent in overinvesting in specific instruments, individual institutions or maturities.
2. Time certificates of deposit: In purchasing a time certificate of deposit (TCD), the portfolio manager will not invest an amount which is more than 10 percent of the total deposits of any single institution. As required by Oregon Revised Statutes, the portfolio manager will be responsible to ensure that a Certificate of Participation has been presented by the issuing institution to cover any outstanding TCD above the statutory level of insurance provided by FDIC/FSLIC. The ESD will always require full collateralization on all TCD investments.
3. Banker's acceptances: All banker's acceptances (BA's) will be purchased from an Oregon chartered financial institution.
4. Repurchase Agreements: All repurchase agreements will be collateralized 110 percent by U.S. Government or Agency obligations. All collateral will be held by a third party for safekeeping. A signed repurchase agreement will be obtained from the issuing institution.
5. U.S. Treasury Obligations: No limits on purchase.
6. U.S. Government Agency Securities: No limits on purchases other than limit on concentration of 25 percent in any one type issue.
7. Local Government Investment Pool (LGIP): The LGIP limits investment to accounts not to exceed the inflation-adjusted maximum under Oregon Revised Statute (ORS) 294.810. Other than this limitation, there is no limit to the amount that can be invested in the pool, although the pool does not collateralize or deliver investment instruments.
8. Diversification Guidelines: Investments will be consistent with statutory requirements under ORS 294.035 and Oregon Short Term Fund rules and recommendations.

Lane Education Service District

Code: DFH
Adopted: 6/28/94
Revised/Readopted: 12/11/01
Orig. Code(s): DFH

Media Production Services

(Is this still needed? Also, this does not really rise to the level of board policy; this looks like internal procedures.)

Graphics and printing services may be provided by Lane ESD and conducted in accordance with applicable copyright laws. If permission is needed for the completion of a project, it is the responsibility of the person making the request to obtain permission from the copyright holder, prior to ESD printing.

Graphics and printing services price lists, including related charges for consultive services provided by Lane ESD staff, will be maintained by the ESD. The graphics and printing price list will be reviewed and updated as necessary, subject to superintendent or designee approval. Prices quoted to users may be calculated to assure that all costs to the ESD are reimbursed.

All billing shall be conducted in accordance with fiscal procedures and responsibilities as established by the ESD.

END OF POLICY

Legal Reference(s):

[ORS 190.003 - 190.110](#)
[ORS 294.305 - 294.520](#)

[ORS 334.125 \(6\)](#)

[OAR 581-024-0280](#)

Lane Education Service District

Code: DH
Adopted: 2/22/94
Revised/Readopted: 12/11/01; 10/22/13
Orig. Code(s): DH

Loss Coverage

The Board and designated ESD employees are responsible to safeguard the ESD against loss regarding funds, fees, cash collections and inventory. The Board shall designate the ESD employees responsible as custodians of such items. The ESD shall purchase bond coverage or equivalent crime coverage in an amount determined by the Board, in consultation with the ESD's agent of record. The ESD will pay the cost of such coverage.

END OF POLICY

Legal Reference(s):

[ORS 328.441](#)
[ORS 334.125\(7\)](#)

[ORS 332.525](#)

[OAR 581-024-0240](#)

Lane Education Service District

Code: DI-AR(1)
Adopted: 11/22/95
Revised/Readopted: 12/11/01
Orig. Code(s): DI-AR(1)

Budget Development

(This would generally not rise to the level of an AR; rather internal procedures.)

1. The director of each ESD service area is responsible for planning, data collection and development of the division's budget proposal.
 - a. The director is expected to reflect the outcomes of program evaluations, needs assessments and advisory committee deliberations in budget proposal development.
 - b. The director shall submit all new program proposals for the superintendent's consideration and reaction prior to development as a service area budget.
 - c. The director shall involve service area staff in developing the service area's budget proposal; responsibility may be delegated to the extent the director believes appropriate. The director is responsible for the service area's budget proposal.
2. The superintendent is responsible for determining which elements of service area budget proposals will be included in the budget submitted to the ESD budget committee.
 - a. The superintendent should at an early date give service area directors a clear indication of the "budget climate" as he/she interprets it, including the potential impact of such factors as program evaluations, educational trends, legislative influences and the like.
 - b. The superintendent will consider in deliberating on service area budget proposals the needs and desires expressed by the ESD's constituency and the data which supports those needs and desires.
3. The director of business services is responsible for assembling service area budget proposals into the appropriate budget document format.
 - a. The director of business services should take steps to ensure that accuracy and consistency are achieved in the use of Handbook II Revised account system and numbers.
 - b. The director of business services should take steps to ensure that supportive information and data is prepared in consistent, readily-understood format and composition.
 - c. The director of business services should ensure that other employees who are extensively involved in preparation of the budget document are kept informed and involved so that they can adequately plan their parts of the process.

E

Lane Education Service District

Code: DI-AR(2)
Adopted: 11/22/95
Revised/Readopted: 12/11/01
Orig. Code(s): DI-AR(2)

Budget Administration Responsibility

(This would generally not rise to the level of an AR; rather internal procedures.)

1. The director of each ESD service area is responsible for administering the budget for the service area and for overseeing the activities of service area employees who participate in the fiscal process.
 - a. It is the responsibility of the director to determine that budgeted funds are used only for the purposes for which they were budgeted, that expenditures do not exceed funds available for the budgeted purposes and that expenditures are limited to necessary and justified transactions.
 - b. It is the responsibility of the director to carefully plan and delegate staff involvement in fiscal processes and to supervise that involvement to ensure responsible, accurate participation.
2. The director of business services of the ESD is responsible for operation of the accounting procedures, including receipt of ESD revenues, payment of valid, authorized claims against ESD funds and record keeping and financial reporting processes.
 - a. The director of business services should report in writing any unsound or illegal fiscal practices or the failure of any employee to carry out fiscal procedural responsibilities to the superintendent and the director of the division involved.
 - b. The director of business services of the ESD is responsible for overseeing the financial statements.

A reconciliation of funds report shall be used for reconciling and balancing the receipt of revenues and disbursement of all ESD funds.

- (1) Record of Cash Received: The sources of entries on the bank deposits shall have duplicate copies made and be attached to each deposit. The cash received as shown by each deposit shall be entered into the accounts receivable automated system and reports will be generated with matching balances. Each deposit will have the following supporting documentation:
 - (a) A duplicate copy of bank deposit;
 - (b) Copy of checks and stubs, if available;
 - (c) Copy of posting report with corresponding balance of deposit;
 - (d) A batch entry sheet will be prepared for each deposit showing the proper distribution account codes.
- (2) Record of Checks Drawn: Accounts payable disbursements are entered into the accounts payable system via balanced batches. After all batches for each check run have been entered into the system, the batches are posted. Check registers and accompanying reports are printed and are filed in binders per month for a full year. After each transaction/posting to the financial statement is made, statistics are checked to make sure

funds are in balance. When invoices are paid, copies of the invoice, receiving information and check are filed in a paid file.

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(3) Procedure at the Close of the Month: At the end of each month, financial reports showing assets, liabilities, revenues and expenditures are printed and distributed. The fund balances on the reports and bank balances are reconciled, thereby assuring that the ESD financial statements and bank balances are reconciled.

(4) Reconciling the Bank Account: The bank statement shall be compared with cancelled checks and duplicate deposit slips.

Cancelled checks shall be filed with bank statements and kept for a period of seven years, then destroyed.

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3. The superintendent is ultimately responsible to the ESD Board for administration of the ESD budget. In keeping with this responsibility, he/she is responsible to remain informed of any changes in statutory fiscal requirements and reserves the ultimate decision regarding the obligation and expenditure of ESD funds consistent with necessary Board action in this regard.

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Lane Education Service District

Code: DIA
Adopted: 2/22/94
Readopted: 12/11/01
Orig. Code(s): DIA

Uncollectible Debts

(This does not look to rise to the level of board policy; rather an internal procedure.)

Lane Education Service District shall make systematic and reasonable efforts to collect monies owed to the ESD. The Board authorizes the administration to develop the appropriate procedures for the implementation of this policy.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[OAR 581-023-0035](#)

Program Budgeting and Accounting Manual, Oregon Department of Education (2000).

Lane Education Service District

Code: DIA-AR
Adopted: 3/14/94
Revised/Readopted: 12/11/01
Orig. Code(s): DIA-AR

Uncollectible Debts

(Consider this is an internal procedure)

The accounting supervisor has the responsibility to assure reasonable efforts are made to collect all monies due Lane ESD. The accounting supervisor will assure a record is maintained of all unpaid invoices. Invoices more than 30 days old will cause the business office to send follow-up letters or billings and/or make telephone contacts. Copies of the communication will be maintained.

Where these procedures have been carried out and the accounts are 12 months or more past due, the director of business services shall submit these accounts to the superintendent with one or more of the following recommendations:

1. Write off the account as uncollectible;
2. Refer to a collection agency;
3. Initiate the garnishment of wages;
4. Keep the account open and make further efforts internally to collect the monies due, including the assessment of interest on the unpaid balance.

Lane Education Service District

Code: DIC
Adopted: 2/22/94
Revised/Readopted: 12/11/01
Orig. Code(s): DIC

Financial Reports and Statements

The Board will receive monthly financial reports that include estimates of expenditures for the major general fund accounts in comparison to budget appropriations, actual receipts in comparison to budget estimates and the ESD's overall cash condition. Supplementary reports on other funds or accounts will be furnished upon request of the Board or superintendent.

The Board may receive a preaudit report from the business manager recapping the year-end closure of financial statements prior to the annual audit.

Appropriate staff will be available at any Board meeting, upon the Board's request, to respond to questions and to present current financial information. The superintendent will notify the Board at any time of substantial deviations in the anticipated revenues and/or expenditures.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)

[ORS 294.311](#)

[ORS Chapter 297](#)

[ORS 328.465](#)

[ORS 334.125](#)

[OAR 162-010-0000 to -0330](#)

[OAR 162-040-0000 to -0160](#)

[OAR 581-023-0037](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DID
Adopted: 10/26/99
Revised/Readopted: 12/11/01
Orig. Code(s): DID

Inventory

The ESD will maintain an inventory of all fixed assets in accordance with governmental accounting standards. The ESD's inventory will be updated to include property newly purchased and disposed.

The inventory of all capitalized items will be maintained in accordance with the procedures required by auditing standards and will be utilized to determine replacement value for insurance purposes.

Inventory records for items owned or leased by the ESD which have a value less than the capitalization level and which otherwise would be defined as equipment will be maintained by each service area director in accordance with procedures to be established by the superintendent.

Definitions as used in auditing standards are as follows:

1. Cost: The original acquisition price of an asset. The cost includes installation cost paid, freight, taxes and related costs;
2. Specific asset (control asset): An item with a value greater than the capitalization level that is a distinct unit of property such as desks or typewriters;
3. Building improvements: The replacement or major renovation of existing building elements such as carpets, air conditioners, new roof. Items not included are repairs to maintain the condition of an asset and cost less than \$5,000;
4. Class items: Items that are individually under the capitalization level but when combined are over the limit and meet the equipment definition;
5. Capitalization level: The minimum dollar amount to capitalize. The capitalization level for Lane ESD shall be \$5,000;
6. Leased assets: Assets being purchased under a lease purchase where title to the assets may pass to the ESD at the end of the lease. If an item is acquired in installments, the total of the installments less interest is to be used to determine if the item should be capitalized;

7. Equipment is defined as follows:

- a. It has anticipated useful life of more than one year;
- b. It is of significant value (\$5,000 minimum except for certain class items);
- c. It retains its original shape and appearance with use;
- d. If damaged it is usually more feasible to repair it than to replace it;
- e. It does not lose its identity through incorporation into a different or more complex unit.

The superintendent or designee shall conduct a complete inventory of all ESD-owned equipment and properties.

The superintendent or designee shall maintain a system of property records which shall include all descriptive matter required by law and by commonly accepted auditing standards.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

OR. DEP'T OF EDUC, PROGRAM BUDGET AND ACCOUNTING MANUAL.

Lane Education Service District

Code: DIE
Adopted: 2/22/94
Revised/Readopted: 12/11/01; 12/13/11
Orig. Code(s): DIE

Audits

An audit of all Lane ESD accounts will be made annually by an accountant selected by the Board from the roster of authorized municipal accountants maintained by the State Board of Accountancy. The audit examination will be conducted in accordance with minimum auditing standards established by the Secretary of State.

The annual audit of the ESD financial records and accounts will include all funds under the ESD's control.

A copy of the audit report will be presented first to the ESD's audit committee and then to the Board. The superintendent will submit a copy of the audit report to the Oregon Department of Education and to the Oregon Secretary of State, Audit Division.

Additionally, Lane ESD shall ensure that component districts conduct an annual audit. Lane ESD will assist component districts, as required, to meet budgeting, accounting and audit requirements. A file of component district audits will be maintained by the ESD.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)
[ORS 297.405 to -297.555](#)
[ORS 297.990](#)

[ORS 334.125](#)
[ORS 334.240](#)

[OAR 581-023-0037](#)
[OAR 581-024-0206\(3\)\(b\)](#)
[OAR 581-024-0265](#)

Lane Education Service District

Code: DJ
Adopted: 5/24/94
Revised/Readopted: 12/11/01; 8/27/02; 3/21/06
Orig. Code(s): DJ

District Purchasing

The function of ESD purchasing is to provide the necessary supplies, equipment and services for the operation of the ESD. Items commonly used will be standardized and be consistent with ESD goals and in the interest of efficiency or economy. The superintendent or designee shall supervise the purchases of all service areas. Service area directors shall exercise prudence in purchases and ensure that standard accounting procedures are followed for the expenditures.

The director of business service is appointed by the Board to serve as purchasing agent. The director will be responsible for developing and administering the ESD's purchasing program.

No obligation may be incurred by any officer or employee of the Board unless that expenditure has been authorized in the budget, by Board action and/or Board policy. In all cases calling for the expenditure of ESD money, except payroll, a requisition and purchase order system must be used.

All persons, firms or corporations supplying goods, materials, equipment or service of any kind to Lane ESD shall certify in writing on all bids for contracts that each, as a contractor with the ESD, will not discriminate against any employee or applicant for employment because of race, color, national origin, religion, sex, gender identity, age, marital status, sexual orientation or disability including discrimination on such basis of any other persons with whom the individual associates.

The Board delegates to the superintendent responsibility of purchases which are within the budget. Purchases of goods or services which are not planned for within the budget or exceed the budget amount must be approved by the Board.

The superintendent or designee is authorized to enter into and approve payment on contracts obligating district funds for products, materials, supplies, capital outlay and services that are within current budget appropriations. The Board shall approve all contracts that are collective bargaining agreements or service contracts that include the provision of labor performed by ESD employees, such as custodial, food service and transportation services. Service area directors shall exercise prudence in purchases and ensure that standard accounting procedures are followed for the expenditures.

No Board member, officer, employee or agent of this ESD shall use or attempt to use their official position to obtain financial gain or for avoidance of financial detriment for themselves, a relative or a member of their household, or for any business with which the Board member, relative or member of household is associated.

END OF POLICY

Legal Reference(s):

R4/28/16 | PH

District Purchasing – DJ

1-2

[ORS 244.040](#)
[ORS 279A, 279B](#) and [279C](#)
[ORS 294.311](#)

[ORS 328.441 to -328.470](#)
[ORS 334.125](#)
ORS 659.850

[OAR 125-055-0040](#)

Lane Education Service District

Code: DJC
Adopted: 2/22/94
Readopted: 12/11/01; 3/21/06; 2/23/10;
2/24/15
Orig. Code(s): DJC

Bidding Requirements (Version 1)

The Board declares its intention to purchase competitively without prejudice and to seek maximum educational value for every dollar expended. All public contracts for goods or services, personal or consulting services, or construction services shall be based upon competitive bids or proposals except:

1. Contracts between contracting agencies or between contracting agencies and the federal government;
2. Insurance and services contracts as provided for under state law;
3. Contracts for the procurement or distribution of textbooks;
4. Energy savings performance contracts;
5. Contracts made with qualified nonprofit agencies providing employment opportunities for disabled individuals;
6. Public improvement contracts exempted by the Local Contract Review Board (LCRB) upon findings that the award would not encourage favoritism or substantially diminish competition and would result in substantial cost savings and other substantial benefits to the contracting agency;
7. Emergency contracts;
8. Any other public contract specifically exempted from the code by another provision or law.

The Board will serve as the LCRB for the ESD. All ESD purchasing shall be conducted in accordance with the Board's adopted rules.¹

A copy of the Board's policy or resolution designating the Board as the LCRB for the ESD shall be filed with the county governing body.

The Board acting as its own LCRB, will adopt² the *Oregon Attorney General's Public Contracts Manual*, OAR Chapter 137, Division 046 through 049 Chapter 137, Division 046 through 049 in effect at the time

¹ The Board may contract with another public agency to serve as its LCRB.

² Public Contracts shall be governed by ORS Chapter 279, 279A, 279B and 279C. Additionally, the Board may, as provided by ORS 279A.065, adopt the Oregon Attorney General's Model Public Contract Rules, OAR Chapter 137 governing purchasing/bid procedures. The Board may also adopt the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125. The Board may adopt portions of those rules or adopt its own rules. A Board that has not

this policy is adopted. These rules govern purchasing procedures, and other matters subject to public contracting provisions of law.

The ESD shall procure the construction manager/general contractor services in accordance with model rules the Attorney General adopts under ORS 279A.065(3).

Additionally, the Board may include as part of its rules portions of the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 through 249 in effect at the time this policy is adopted.

Where necessary, the Board has made the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the ESD and made available on request.

The ESD shall review its rules each time the Attorney General adopts a modification of the model rules, as required by ORS 279A.065 (5)(b), to determine whether any modifications need to be made to ESD rules to ensure compliance with statutory changes. Modifications will be made only following review by the ESD's legal counsel. New rules, as necessary, will be adopted by the Board. In the event it is unnecessary to adopt new rules, Board minutes will reflect that the review process was completed as required.

The Board recognizes that a public contracting agency that has not established its own rules of procedure as required by ORS 279A.065 (5) is subject to the model rules adopted by the Attorney General, including all modifications to the model rules that the Attorney General may adopt.

Public contracts, if awarded, will be awarded to the lowest, responsive and responsible bidder or the best, responsive and responsible proposer consistent with solicitation document provisions. The Board may reject in whole or in part, any bid or proposal not in compliance with all prescribed procedures and requirements and may reject for good cause any bid or proposal upon a written finding that it is in the public interest to do so. Such findings shall conform with criteria as specified by the *Oregon Attorney General's Public Contracts Manual*.

Opportunity will be provided to all responsible suppliers to do business with the ESD. The business services director will develop and maintain lists of potential vendors for various types of materials, equipment and supplies. Such lists may be used to develop a mailing list for distribution of specifications and solicitations for bids or proposals. Any supplier may be included in the list upon request.

Procurement estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process described in ORS 279B.

Records of bids, proposals and specifications will be kept in the ESD administration office and will conform with Oregon Revised Statutes and applicable records retention provisions of the *Oregon Attorney General's Public Contracts Manual*.

END OF POLICY

Legal Reference(s):

established its own rules of procedure for public contracts is subject to the model rules (OAR Chapter 137) adopted by the Attorney General.

[ORS Chapter 279](#)
[ORS Chapter 279A](#)
[ORS Chapter 279B](#)

[ORS Chapter 279C](#)
[ORS 670.600](#)
[OAR Chapter 125](#), Divisions 246 - 249

[OAR Chapter 137](#), Divisions 045 - 049
[OAR 459-005-0020](#)

[OREGON PROCUREMENT MANUAL](#), Oregon Department of Administrative Services.

DELETED

Lane Education Service District

Code: DJC-AR
Revised/Reviewed: 7/28/09; 6/22/10; 2/24/15;
2/23/16; 8/11/16; 1/03/23
Orig. Code(s): DJC-AR

Special Procurements and Exemptions from Competitive Bidding (Version 1)

SPECIAL PROCUREMENTS

The ESD shall submit a written request to the Board, acting as the Local Contract Review Board (LCRB), that describes the contracting procedure, the goods and services or class of goods and services that are the subject of the special procurement and circumstances that justify the use of a special procurement under the standards as follows: the special procurement is unlikely to encourage favoritism in the awarding of public contract or to substantially diminish competition for public contracts and, (A) is reasonably expected to result in substantial cost savings to the district or to the public, or (B) otherwise substantially promote the public interest in a matter that could not practicably be realized by complying with requirements that are applicable under Oregon Revised Statute (ORS) 279B.055, 279B.060, 279B.065, 279B.070 or under any related rules. Public notice of the approval of a special procurement must be given in the same manner as provided in ORS 279B.055(4). If the district intends to award a contract through special procurements that calls for competition among prospective contractors, the district shall award the contract to the contractor it determines to be most advantageous to the district. When the LCRB approves a class special procurement the district may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for a special procurement.

1. Brand Names or Products, “Or Equal,” Single Seller and Sole Source
 - a. The ESD may purchase brand names or products from a single seller or sole source without competitive bidding subject to the limitations of this rule.
 - b. Solicitation specifications for public contracts of the ESD shall not expressly or implicitly require any product of any particular manufacturer or seller except as expressly authorized in subsections c. and d. of this rule.
 - c. The ESD may specify a particular brand name or equal specification when the use of a brand name or equal specification is advantageous to the ESD, because the brand name describes the standard of quality, performance, functionality and other characteristics of the product needed by the ESD.
 - (1) The ESD is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final.
 - (2) The ESD is not prohibited from specifying one or more comparable products as examples of the quality, performance, functionality or other characteristics of the product needed by the ESD.
 - (3) A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:

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- (a) The use of a brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts; or
 - (b) Specification of the brand name, mark or product would result in cost savings to the ESD; or
 - (c) There is only one manufacturer or seller of the product of the quality, performance or functionality required; or
 - (d) The efficient utilization of existing goods requires the acquisition of compatible goods and services.
- d. The ESD may award a contract for goods or services without competition when the LCRB determines in writing that the goods or services, or class of goods or services, are available from only one source. The determination of a sole source must be based on written findings that may include:
- (1) A brief description of the contract or contracts to be covered, including contemplated future purchases;
 - (2) Description of the product or service to be purchased; and
 - (3) The reasons the ESD is seeking this procurement method, which shall include any of the following:
 - (a) That the efficient utilization of existing goods requires acquiring compatible goods or services;
 - (b) That the goods or services required to exchange software or data with other public or private agencies are available from only one source;
 - (c) That the goods or services are for use in a pilot or an experimental project; or
 - (d) Other findings that support the conclusion that the goods or services are available from only one source.
 - (4) To the extent reasonably practical, the contracting agency shall negotiate with the sole source to obtain contract terms that are advantageous to the contracting agency.
- e. The ESD may specify a product or service available from only one manufacturer but available through multiple sellers after complying with subsection 1.c. above documenting the procurement file with the following information:
- (1) If the total purchase is over \$10,000 but does not exceed \$150,000, and a comparable product or service is not available under an existing Mandatory Use Contract, the district must obtain informal competitive quotes, bids or proposals and document this process in the procurement file;
 - (2) If the purchase does not exceed \$150,000, and the supplies or services are not available under an existing price agreement for information technology with competing products or Mandatory Use Contract, the district must first request and obtain prior written authorization from the LCRB to proceed with the acquisition.
 - (3) If the ESD intends to make several purchases of brand name-specific supplies and services from a particular manufacturer or seller for a period not to exceed five years, the district must so state this in the procurement file and in the solicitation document, if any, or a public notice of a solicitation. If the total purchase amount is estimated to exceed \$150,000, this shall be stated in the advertisement for bids or proposals.

Findings of Fact/Conclusion of Compliance with Law (OAR 125-247-0275)

The ESD shall submit a written request to the local contract review board that describes the contracting procedure, goods and services subject of the special procurement and the circumstances that justify the use of the special procurement.

- a. It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts and is reasonably expected to result in substantial cost savings to the district which could not be realized under ORS 279B.055, 279B.060, 279B.065 or 279B.070 as required by ORS 279B.085(4).
- b. Public notice of the approval must be given in the same manner as provided in ORS 279B.055(4).
- c. This rule requires the ESD to make a good faith effort to determine that no other sources are available for the specified products.
- d. The ESD maintains open lists from which vendors are contacted for quotations and utilizes electronic means of determining new vendors on an ongoing basis.
- e. The awarding of a contract as described in this special procurement should result in substantial cost savings by virtue of the ability to reduce solicitation costs when it is known that comparable products are not available, or when specifying another product solely to meet a competition requirement might lead to lower initial cost but longer lifetime cost.
- f. When the local review board approves a class special procurement the ESD may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for procurement.

2. Advertising Contracts, Purchase of

- a. The ESD may purchase advertising in any media, regardless of a dollar amount, without competitive bidding.
- b. The Board, acting as the LCRB of the ESD must use competitive methods whenever possible to achieve best value and must document in the procurement file the reasons why a competitive process was deemed impractical and the resulting contract must be in writing.
- c. If the anticipated purchase exceeds \$10,000 and a competitive method is used, the ESD must post notice on the Oregon Procurement Information Network (ORPIN).

Findings of Fact

The ESD traditionally purchases advertising in newspapers. The following findings relate primarily to newspapers and written publications; however, the ESD may also purchase advertising for student activities or educational programs in other media, such as radio or television, where these findings apply:

- a. By their nature, media sources are generally unique. Advertisements are placed in a particular source because of the specific audience that source serves;
- b. Competition to furnish advertising space in daily newspapers of general, trade or business circulation in the vicinity of the ESD is limited;
- c. Cost savings are difficult to quantify where the sources are unique and not interchangeable;
- d. Advertisements may be placed to satisfy legal notice or Board policy requirements;
- e. Other published advertisements or notices, such as routine public notices, personnel recruitment information, etc., are placed in one or more of the publications of general circulation in the local area and other publications, as appropriate;

- f. The communities served by the ESD rely upon its use of the local daily newspaper as a central source of news and information regarding ESD activities;
- g. It is unknown whether contracts for advertisements placed with radio, television or other broadcast media are going to result in cost savings if not placed for competitive bid or request for proposal (RFP). If possible savings could be obtained through competitive means, the ESD would attempt to obtain competitive quotes or bids, as appropriate.

Conclusion of Compliance with Law

Due to limited competition and unique nature of sources, it is unlikely that this class special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Further, any contracts awarded under this class special procurement would result in a cost savings available to the ESD where the ESD can achieve volume savings through contracts for advertising with a particular media source, or otherwise substantially promote the public interest.

2. Advertising Contracts, Sale of

The ESD may sell advertising for ESD publications and activities, regardless of a dollar amount, without competitive bidding, including school newspapers, yearbooks, athletic programs, drama or music programs and the like.

Findings of Fact

Sales of advertising for student activities are generally other fund revenues, where student groups solicit advertisements from local businesses to help with the cost of the activity itself. A common example is the sale of advertising in school newspapers and yearbooks. The circulation of the newspaper and yearbook is limited to the students, teachers, parents and interested members of the community associated with the activities of that particular school. Due to the limited circulation and audience, the businesses that participate by purchasing advertising do so partly in the spirit of good will. Any business is welcome to place an advertisement in the school newspaper or yearbook; all it needs to do is to contact any ESD school which publishes one. The ESD itself would not achieve any increased revenue to the General Fund by seeking competitive bids or proposals for such advertising. This holds true for other student activities, such as athletics, drama or music events and the like.

Conclusion of Compliance with Law

These findings indicate that it is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Any business or individual who wishes to advertise in this manner may do so by simply contacting the student group responsible for the activity.

The sale of advertising for student activities such as school newspapers, yearbooks, athletic, drama or music programs would not benefit from competitive procurement. Such a requirement would place an unnecessary burden on the student group's activity and there is no financial advantage to the ESD in doing so. Consequently, the cost savings test is not an issue.

Equipment Repair and Overhaul

- a. The ESD may enter into a public contract for equipment repair or overhaul without competitive bidding, subject to the following conditions:
- (1) Service or parts required are unknown and the cost cannot be determined without extensive preliminary dismantling or testing; or
 - (2) Service or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source; and
 - (3) The purchase is made within the limits and pursuant to the methods in subsection b. of this rule.
- b. The following limitations apply to this rule:
- (1) If the contract is less than or equal to \$150,000, the school or department shall submit in writing to the superintendent or designee the reasons why competitive bids or quotes are deemed to be impractical. The superintendent or designee will accordingly document in its procurement file and may enter directly into the contract;
 - (2) If the school or department official thinks the contract may exceed \$150,000, they shall submit in writing to the superintendent or designee the reasons why competitive bidding is deemed to be impractical and a description of the cost savings to be obtained by a special procurement. The superintendent or designee may prepare a specific request for the anticipated contract to be obtained through special procurement procedures to submit to the LCRB for approval.

Findings of Fact

The need for equipment repair or overhaul cannot be anticipated by district staff. If a piece of equipment is broken or not working properly, the ESD incurs cost of downtime, possible replacement equipment rental fees, staff time and other inconveniences or liabilities to its programs.

Generally, there are a limited number of vendors who are able to perform repair or overhaul on a particular piece of equipment because of its make or manufacture. Sophisticated equipment may require specially trained personnel available from only one source. Often, a piece of equipment will have a partial warranty in place which will guarantee some savings to the ESD in the parts and/or labor needed to do the repair or overhaul. This warranty savings may only be achieved if the original manufacturer or provider of the equipment performs the necessary repair or overhaul.

The dollar limits on the use of this special procurement procedure ensure that when the cost of the equipment repair or overhaul is expected to exceed \$150,000, the ESD will either seek formal competitive bids or, if that is not practical or cost effective, obtain a specific special procurement procedure from the LCRB to proceed with the purchase of the needed repair or overhaul.

Conclusion of Compliance with Law

It is unlikely that this special procurement procedure will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts because the dollar limits incorporated into this special procurement when the anticipated costs exceed \$150,000, insure the district will seek formal competitive bids and proposals. If the formal process is not practical, the

district will obtain a specific exemption from the LCRB to proceed with the purchase of the needed repair or overhaul.

The awarding of public contracts under this special procurement will result in a cost savings to the ESD, as required by ORS 279B.085, because the ESD incurs direct and indirect costs from the moment equipment breaks down or becomes unusable. This special procurement only applies to equipment already owned by the ESD and does not provide for the purchase of new equipment. The district must be able to purchase necessary services and parts as quickly as possible in order to minimize equipment downtime and potential costs during that downtime.

3. Copyrighted Materials

The ESD may, without competitive bidding and regardless of a dollar amount, purchase copyrighted materials where there is only one known supplier available for such goods. Examples of copyrighted materials covered by this special procurement procedure may include, but are not necessarily limited to, newly adopted textbooks/instructional materials, workbooks, curriculum kits, reference materials, audio and visual media and non-mass-marketed software from a particular publisher or their designated distributor.

Findings of Fact

By their nature, copyrighted materials are protected for the use of a single owner. Copyrighted materials may not be duplicated by others without the copyright owner's permission or license. Copyrights are established and regulated under federal law.

Often, copyrighted materials are produced by only one supplier who may be the owner of the copyright or their licensee. Textbooks/Instructional materials are examples of copyrighted materials that the ESD purchases through a sole source. Textbooks/Instructional materials are adopted through a statewide process under the authority of the Oregon Department of Education.

A textbook/instructional material adoption defines the various materials which the ESD will purchase for use in its educational programs.

The ESD purchases its textbooks/instructional materials through the Northwest Textbook Depository. This practice enables the regional textbook depository to purchase and warehouse textbooks/instructional materials in conformance with adoptions made in the states of their region. The result is that savings are achieved through the depository's combined purchases on behalf of member ESDs. Freight costs for individual districts are reduced by the bulk purchases of the depository and the depository takes on the cost of stocking and warehousing enough to meet each member ESD needs.

The system of textbook/instructional materials distribution enables the ESD to participate in the largest possible bulk purchasing activity of adopted textbooks/instructional materials in the region. This ensures a cost savings to the ESD. A savings that would be jeopardized if the ESD was to act as an individual purchaser.

Conclusion of Compliance with Law

This special procurement will not encourage favoritism or substantially diminish competition in the awarding of public contracts. The production and distribution of copyrighted materials is controlled by the owner of the copyright and may only be permitted through a sole source. The ESD has no control over this.

The awarding of contracts pursuant to this special procurement will result in a cost savings to the ESD when it needs to purchase copyrighted materials and there is only one known supplier for such goods, or otherwise substantially promote the public interest.

4. Product Prequalification

- a. When specific design or performance specifications must be met or such specifications are impractical to create or reproduce for a type of product to be purchased, the district may specify a list of approved or qualified products by reference to the prequalified product(s) of particular manufacturers or vendors in accordance with the following product prequalification procedure:
 - (1) The ESD will make reasonable efforts to notify all known manufacturers and vendors of competing products of the ESD's intent to compile a list of prequalified products. The notice will explain the opportunity manufacturers and vendors of competing products will have to apply to have their product(s) included on the ESD's list of prequalified products. At its discretion, the ESD may provide notice by advertisement in a trade paper of general statewide circulation or other appropriate trade publication; or instead of advertising, the ESD may provide written notice to those manufacturers and vendors appearing on the appropriate list maintained by the ESD; and
 - (2) The ESD will accept manufacturer and vendor applications to include products in the ESD's list of prequalified products up to 15 calendar days prior to the initial advertisement for bids or proposals for the type of product to be purchased, unless otherwise specified in the advertisement or in the ESD's written notice.
- b. If the ESD denies an application for including a product on a list of prequalified products, the ESD shall promptly provide the applicant with a written notice of the denial and include the reason for denial. The applicant may submit a written appeal within 7 calendar days to the district business manager to request review and reconsideration of the denial.

Findings of Fact

- a. There are occasions when the ESD needs to establish a list of prequalified products before it invites bids or proposals to furnish the products. The ESD may have a specific performance or design need, but it is impractical for the ESD to create a specification for the type of products to be purchased. An example is audiovisual equipment. There is a tremendous variety of audiovisual products offered in the market. The equipment technology is complex and constantly changing. It would be very burdensome and time consuming for the ESD to generate nonbrand name, generic performance specifications for such equipment every time it wants to make a purchase.

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Also, competition would be poorly served because bidders and proposers would not know in advance whether their offered product would meet the general specification substantially enough to be considered a responsive offer. The decision to make an award would be slow, because each product offered would have to be analyzed against the ESD's specification. Slowdown in the award process affects both bidders, who are asked to hold their bids open until award is made, and ESD programs, because staff are not able to order the equipment they need until the contract is awarded.

In this case, it might be more cost effective and efficient for the ESD to prequalify products and establish a list of approved products before invitations to bid are sent out. The prequalification process can be done some time before the need for a new contract. Once the prequalified product list is established, the bidding and contract award process can go quickly and smoothly.

- b. A second occasion when prequalification of products will be useful is when the specific design or performance specifications for a product are so exacting that the ESD must have time to carefully consider what is offered in the market that may or may not meet the specifications and, if necessary, reconsider its options before issuing an invitation to bid.
- c. This rule sets out a process of prequalification which requires the use of advertisement or other appropriate means to notify vendors of competing products of their opportunity to submit items for prequalification. The ESD maintains vendor mailing lists which are open to all interested vendors. The ESD uses these lists routinely to notify vendors of its intentions to prequalify products or to invite bids on products.
- d. This includes a 15-day time limit between the closure of a prequalification list and a related invitation to bid. This time factor ensures that vendors have a reasonable time to apply to include their products on a prequalified product list.
- e. Subsection b. of this rule provides vendors with an appeal process to follow if their application for prequalification is denied.

Conclusion of Compliance with Law

Where prequalification of products is appropriate, it is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or diminish competition for such contracts. There are several safeguards in the rule to prevent this, including notice, advertising, time and appeal process requirements to ensure that vendors are given a fair and open opportunity to participate in the prequalification process.

The prequalification of products process is a time-consuming effort for the ESD. It is not a shortcut procurement method. The ESD would use this method only after balancing cost-saving considerations, such as the ability of the ESD to create or generate nonbrand name generic specifications for types of products or the need for lengthy product evaluation prior to a contract award. If the prequalification method is chosen, it will result in a cost savings to the ESD because the normal method of product selection is too cumbersome and costly to pursue, or otherwise substantially promote the public interest.

2. Requirements Contracts (Blanket Purchase Orders, Price Agreements)¹

- a. The business manager, on behalf of the ESD, may establish requirements contracts for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining ESD requirements for volume discounts, standardization among schools and departments and reducing lead time for ordering.
- b. The ESD may enter into a requirements contract (also known as a blanket purchase order or price agreement) whereby it is agreed to purchase goods or services for an anticipated need at a predetermined price or price discount from a price list, provided the contract is led by a competitive procurement process pursuant to the requirements of the public contracting code and these rules.
- c. Once a requirements contract is established, schools and departments may purchase the goods and services from the awarded contractor without first undertaking additional competitive solicitation.
- d. Schools and departments shall use requirements contracts established by the ESD, unless otherwise specified in the contract, allowed by law or these rules or specifically authorized by the superintendent or designee.
- e. Under the authority of ORS 279A.025 and 279B.085, the ESD may use the requirements contract entered into by another Oregon public agency when:
 - (1) The original contract met the requirements of public contracting code; and
 - (2) The original contract allows other public agency usage of the contract; and
 - (3) The original public contracting agency concurs and this is documented by a written interagency agreement between the ESD and the agency.
- f. The term of any ESD requirements contract, including renewals, shall not exceed five years unless otherwise permitted under the public contracting code.

Findings of Fact

This rule permits the ESD to enter into a requirements contract, in which the vendor agrees to provide specified goods and services over the term of the contract at the bid price or discount rate.

A requirements contract is useful when the purchase of the goods or services are routine and repetitive. For example, school, office, custodial and facilities maintenance supplies are customarily purchased through requirements contracts.

Requirements contracts are a common method of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, obtaining volume discounts, standardizing usage among schools and departments and reducing lead time for ordering.

¹ The Oregon Procurement Information Network (ORPIN) allows authorized members to utilize the state's price agreement/contracts to purchase goods and services. Authorized Oregon Cooperative Procurement Program (ORCPP) members can legally attach to a state price agreement and forego the competitive bid process. Access to hundreds of competitive price contracts for a wide variety of goods and services: vehicles, computers, furniture, copiers, fax machines, travel, pharmaceuticals, office products, etc., is available. Counties, cities, schools, municipalities or their public corporate entities having local governing authority, a United States governmental agency or American Indian tribe or agency are eligible to participate.

The ESD establishes requirements contracts as a result of open competitive bidding or RFP processes, unless otherwise permitted under the public contracting code.

D The ESD limits the term of a requirements contract, including all renewal options, to a maximum of five years before competitive rebidding must be done, unless otherwise permitted under the public contracting code.

The ESD may use the requirements contracts established by other public agencies, subject to certain conditions of state law, Board policy and administrative regulation.

Conclusion of Compliance with Law

E It is unlikely that this special procurement will result in favoritism in the awarding of public contracts or diminish competition for such contracts. The ESD will only enter into requirements contracts which result from open competitive bidding processes. This condition applies also to the use of requirements contracts established by other public contracting agencies.

E The awarding of ESD requirements contracts will result in a cost savings to the ESD, or otherwise substantially promote the public interest. It would be costly and inefficient to make routine, repetitive purchases of goods and services through individual transactions. Also, the guaranteed volume of a requirements contract allows the ESD to get better prices from bidders.

3. Used Personal Property or Equipment, Purchase²
 - a. Subject to the provisions of this rule, the ESD may purchase used property or equipment without obtaining competitive bids or quotes, if the ESD has determined that the purchase will result in cost savings to the ESD and will not diminish competition or encourage favoritism. “Used personal property or equipment” is property or equipment which has been placed in its intended use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used” at the time of ESD purchase. Used personal property or equipment generally does not include property or equipment if the ESD was the previous user, whether under a lease, as part of a demonstration, trial or pilot project or similar arrangement.
 - b. For purchases of used personal property or equipment costing less than or equal to \$150,000, the ESD shall, where feasible, obtain three competitive quotes unless the ESD has determined and documented that a purchase without obtaining competitive quotes will result in cost savings to the ESD and will not diminish competition or encourage favoritism.
 - c. For purchases of used personal property or equipment totaling \$150,000 or more, the ESD shall attempt to obtain three competitive quotes. The ESD will keep a written record of the source and amount of quotes received. If three quotes are not available, a written record must be made of the attempt to obtain quotes.

² When contracting with another governmental entity, a district has a stator exemption under ORS 279A.025. The district may purchase state/federal surplus property through the Department of Administrative Services (DAS), State Services Division for Surplus Property. For more information on this program, contact DAS at 503-378-3014.

Findings of Fact

The ESD is responsible to manage expenditures in the best interests of the public. Cost savings can be achieved through the procurement of used property and equipment. The ESD purchases used property and equipment when it meets the ESD's needs and is cost effective. Considerations include type, quality, quantity and estimated useful life of the used item.

Used equipment and property becomes available sporadically and without notice. Used equipment and property is generally sold on a first-come, first-served basis. When used property or equipment does become available, the ESD must be able to respond immediately in order to obtain the property or equipment.

Some types of property or equipment may not be readily available in the new goods market. The ESD may have to look for used items to fill the need.

Competition to provide used property and equipment may be very limited and inconsistent, depending on the type of product.

The ESD maintains vendor lists which include information on whether a vendor provides used property or equipment. These lists are open to all vendors.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the award of public contracts or substantially diminish competition for such contracts. The purchase of used property or equipment depends on an inconsistent, sporadic market. When a used item is available, there is often little competition available. Sources for used items of the type, quality and quantity required by the district are inconsistent. This rule requires the ESD to attempt to obtain and document quotes as appropriate to the dollar amount of the purchase. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. The cost of used equipment or property is generally substantially less than that of new. Savings of 20 percent to 50 percent are not uncommon. Used equipment can provide good value to the ESD and help ensure the continuation of ESD services and programs.

4. Information Technology Contracts

The ESD may enter into a contract to acquire information technology hardware and software without competitive bidding subject to the following conditions:

- a. If the contract amount does not exceed \$150,000, the ESD shall attempt to obtain three competitive quotes pursuant to the rules governing Intermediate Procurements. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
- b. If the contract amount exceeds \$150,000, the ESD shall determine and use the best procurement method, pursuant to the public contracting code and these rules, and shall solicit written proposals in accordance with the requirements of the *Attorney General's Model Public*

Contract and LCRB Rules. The ESD shall document the evaluation and award process, which will be part of the public record justifying the award;

- c. If the amount of the contract is estimated to exceed \$150,000, the ESD shall provide proposers an opportunity to review the evaluation of their proposals before final selection is made.

Findings of Fact

- a. Rapid changes in technology make it necessary for the ESD to be able to purchase needed computer equipment quickly.
- b. Pricing for high-technology equipment also changes rapidly. It is frequently possible to take advantage of frequent price changes in the marketplace in the purchase of computer equipment.
- c. There is generally sufficient competition among vendors of information technology hardware and software for ESD business.
- d. The ESD will follow rules governing special procurements and obtain at least three informally solicited quotes for purchases less than or equal to \$150,000.
- e. If the ESD requires a brand name or sole source product, the district will follow its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to procure it.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the award of ESD contracts or substantially diminish competition for ESD contracts. The purchase of information technology hardware and software will be made in accordance with other competitive bidding rules contained in this administrative regulation. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of information technology hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur.

2. Telecommunications Systems - Hardware and Software Contracts

- a. The ESD may enter into a contract to acquire telecommunications system hardware and software, without competitive bidding, subject to the following conditions:
 - (1) If the contract amount does not exceed \$150,000, the ESD shall attempt to obtain three competitive quotes pursuant to the rules governing Intermediate Procurements. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
 - (2) If the contract amount exceeds \$150,000, the ESD shall determine and use the best procurement method, pursuant to the public contracting code and these rules and shall solicit written proposals in accordance with the requirements of Chapter 137, Divisions 047 and 049 of the *Attorney General's Model Public Contract [and LCRB] Rules*. The ESD shall document the evaluation and award process, which will be part of the public record justifying the award.

b. The telecommunications solicitation authorized in subsection 10.a.(1) of these rules shall:

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- (1) State the contractual requirements in the solicitation document;
 - (2) State the evaluation criteria to be applied in awarding the contract and the role of any evaluation committee. Criteria that would be used to identify the proposal that best meets the district's needs may include, but are not limited to, cost, quality, service and support, compatibility, product or system reliability, vendor viability and financial stability, operating efficiency and expansion potential;
 - (3) State the provisions made for bidders or proposers to comment on any specifications which they feel limit competition.

Findings of Fact

- F**
- a. Rapid changes in technology make it necessary for the ESD to be able to purchase needed telecommunications hardware and software quickly.
 - b. Since deregulation, there is generally adequate competition among vendors of telecommunication hardware and software to allow the ESD to make competitive purchases.
 - c. Pricing for telecommunications hardware and software also changes frequently. It is important for the ESD to take advantage of price competition in the marketplace.
 - d. The ESD will follow procedures governing special procurements and document reasonable efforts to obtain at least three informally solicited quotes for purchases over \$10,000 but less than or equal to \$150,000.
 - e. If a purchase of telecommunications hardware or software is expected to cost more than \$150,000, the ESD will use a formal competitive bidding or proposal process in accordance with these rules and the *Attorney General's Model Public Contract [and LCRB] Rules*.
 - f. There are also times when the ESD needs to purchase specific items that are compatible with current equipment. On these occasions, the district will follow its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to make the purchase.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. The purchase of telecommunications hardware and software will be made in accordance with other competitive bidding rules herein. If the anticipated purchase is over \$150,000, the ESD will advertise its need.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of telecommunications hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur.

2. Telecommunications Services

- E**
- a. The ESD shall secure the most competitive, cost-effective telecommunications services of the quality needed to meet all service performance requirements while minimizing administrative and service delivery costs. The ESD will use routine purchasing procedures whenever possible, but if necessary, the ESD can consider alternative procurement methods in accordance with this rule.

The ESD will generally follow the normal competitive procurement processes in obtaining telecommunications services. This process will only be used if necessary where there is a lack of sufficient competition to furnish needed services.

b. In determining the appropriate procurement method for telecommunications services, the ESD shall comply with the requirements of ORS 291.038 and determine whether competition exists. In determining whether competition exists, the ESD may consider the following factors:

- (1) The extent to which alternative providers exist in the relevant geographic and service market; the greater area of [Insert Name] County;
- (2) The extent to which alternative services offered are comparable or substitutable in technology, service provided and performance. For example, if the ESD requires digital services, analog services are not comparable or substitutable. If the ESD requires fiber optic technology, then copper, microwave or satellite transmission technology may not be comparable or substitutable;
- (3) The extent to which alternative providers can respond to the ESD's interest in consistency and continuity of services throughout its service area, volume discounts, equitable service for all users, centralized management and limiting ESD liability. For example, to be considered as the ESD's long-distance service provider, any long-distance service vendor must be able to meet, support and interface with the ESD's centralized automated billing requirements. The ESD must document for the record its findings on these factors or any other factors used in determining whether competition exists. In developing its findings, the ESD may solicit the information either through informal telephone or written contacts or through a formal solicitation such as an RFP.

c. If the ESD determines that competition does not exist in the area for the relevant service, the ESD may proceed to secure the service on a sole source basis, as described in the ESD's rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements.

Findings of Fact

- a. Since deregulation, there is generally adequate competition among vendors of telecommunication services to allow the ESD to make competitive procurements.
- b. Since there is competition, price competition exists in the marketplace. It is important for the ESD to take advantage of existing competition.
- c. The ESD will follow its rules governing special procurements and document reasonable efforts to obtain at least three informally solicited quotes for purchases less than or equal to \$150,000. The ESD shall keep a written record of the sources of the quotes or proposals received. If three quotes or proposals are not reasonably available, fewer will suffice, but the ESD shall make a written record of the effort made to obtain the quotes or proposals.
- d. If a purchase of service is expected to cost more than \$150,000, the ESD will use a formal competitive bidding or proposal process in accordance with these rules and the *Attorney General's Model Public Contract and LCRB Rules*.
- e. There may be occasions where there is limited competition that can furnish telecommunications services of the quality and extent required by ESD operations. In such instances, the ESD will follow this rule and also its rule governing Brand Names or Products, "Or Equal," Single Seller and Sole Source, Section 1. under Special Procurements to procure needed services from the sole source.

Conclusion of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts. Routinely, the purchase of telecommunications services will be made in accordance with other competitive bidding rules contained in this administrative regulation. If the anticipated purchase is over \$150,000, the ESD will advertise its need, issue a written solicitation document and invite written bids or proposals to be furnished in response.

There may be circumstances, however, where sufficient competition does not exist in the relevant geographic and service market area. In such cases, the ESD will follow this rule in determining whether sufficient competition exists to make a competitive procurement.

The use of this special procurement will result in a cost savings to the ESD, or otherwise substantially promote the public interest. Competition will be encouraged at all dollar levels of purchase of telecommunications hardware and software. This rule gives the ESD some flexibility in selecting the method of competitive procurement but requires adherence to the rule on brand name or sole source acquisitions if those situations occur. The rule also states the steps to be taken to document situations where sufficient competition may not exist and a sole source purchase needs to be made.

2. Hazardous Material Removal; Oil Cleanup

- a. The ESD may enter into public contracts without competitive bidding, regardless of a dollar amount, when ordered to cleanup oil or hazardous waste pursuant to the authority granted to the Oregon Department of Environmental Quality (DEQ) under ORS Chapter 466, especially ORS 466.605 through 466.680. In exercising its authority under this exemption, the ESD shall:
 - (1) To the extent reasonable under the circumstances, encourage competition by attempting to make informal solicitations or to obtain informal quotes from potential suppliers of goods and services;
 - (2) Make written findings describing the circumstances that require the cleanup or maintain a copy of the DEQ order for the cleanup;
 - (3) Record the measures taken under 12.a.(1) of this rule to encourage competition, the amount of the quotes or proposals obtained, if any, and the reason for selecting the contractor to whom award is made.
- b. The ESD shall not contract pursuant to this special procurement in the absence of an order from the DEQ to cleanup a site which includes a time limit that would not allow the ESD to hire a contractor under normal competitive bidding procedures. Goods and services to perform other hazardous material removal or cleanup will be purchased in accordance with normal competitive bidding procedures as described in Board policy with this administrative regulation.

Findings of Fact

- a. When the DEQ orders a public agency to remove or cleanup hazardous material or oil, the public agency must respond within a very short time, which is stated in the DEQ order. This time period does not generally allow the agency to take the time necessary to solicit written

bids or proposals for the work to be performed. The ESD would be liable for any delay in responding to DEQ orders to perform hazardous material removal or cleanup.

- b. This exemption will not be used in those situations where there is no DEQ order to remedy the situation. Routine competitive procurement methods will be used where there is no DEQ order to act immediately. The ESD maintains open lists of vendors who are interested in providing hazardous material removal and cleanup services. Whenever it needs hazardous material removal or disposal, the ESD makes use of these lists to solicit quotes, bids or proposals as needed, in addition to advertising the procurement as required.
- c. Cost savings are achieved through this exemption because the ESD can be liable for DEQ penalties and fines if it does not timely remove hazardous materials or oil as ordered. There is also serious risk in these situations that property damage or personal injury could result if the ESD is slow to act.

Conclusions of Compliance with Law

It is unlikely that this special procurement will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts as required by ORS 279B.085(3)(a). If it is under DEQ order to act immediately, the ESD will still attempt to obtain competitive quotes for the work to be performed as it has the ability and time to do so. Unless the ESD is faced with the quasi-emergency situation of a DEQ order to remove or cleanup hazardous waste or oil, it will follow normal competitive procedures to obtain these services.

The award of public contracts pursuant to this special procurement will result in a cost savings to the ESD in these situations, as required by ORS 279B.085(3)(b), because the ESD must comply with the law and avoid and minimize risk to persons and property. Where possible, it will seek competitive quotes for the work to be performed and will award the contract to the lowest, responsive and responsible bidder.

2. Renegotiation of Existing Contracts with Incumbent Contractors

- a. The ESD may amend or renegotiate contracts with existing vendors, service providers or other parties subject to the limitations of this rule.
- b. The ESD has determined that [value engineering,] [specialized expertise required,] [public safety] [and technical complexity], generally do not apply to this special procurement procedure.
- c. The renegotiated contract falls within a current special procurement procedure, but if not the LCRB must approve a separate special procurement.
- d. The ESD may renegotiate certain terms, but they must not unreasonably alter the scope of the original contract.

Findings of Fact

- a. The LCRB may amend contracts when it is in the best interest of the ESD. The superintendent and/or other designee, acting on behalf of the LCRB, may renegotiate certain provisions, including:
 - (1) Price;
 - (2) Term;
 - (3) Delivery and shipping;
 - (4) Order size;

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- (5) Substitution;
- (6) Warranties;
- (7) Online ordering systems;
- (8) Price adjustments;
- (9) Product availability;
- (10) Product quality;
- (11) Reporting requirements; or
- (12) Discounts.

Any contract amendment will be supported by legal consideration when necessary to validate the amended provision.

- b. The amended terms must be within a reasonable scope of the original contract, but not fundamentally alter the agreement or nature of goods or services. ESDs may, however, request functionally equivalent substitutes for goods or services in the original contract.
- c. The contract as a whole must be more favorable to the individual needs of the ESD to justify renegotiation. Cost may be a factor in determining what is a favorable change to the original contract, but the ESD may use factors other than cost that demonstrate that the amended contract is more favorable to the unique needs of the ESD.

Conclusion of Compliance with Law

This special procurement will not encourage favoritism or substantially diminish competition in awarding public contracts because it already exists as a contract awarded in compliance with the ESD's special procurement and public contracting code.

The awarding of contracts under this special procurement will result in cost savings to the ESD when it needs to renew its original contract with vendors, service providers or other parties, or otherwise substantially promote the public interest.

EXEMPTIONS FROM COMPETITIVE BIDDING

All public contracts shall be based upon competitive bids or proposals, except the following:

1. Contracts which have been specifically exempted under ORS 279A.025 and 279C.335; and
2. Contracts covered by the class exemptions in the following set of rules developed pursuant to ORS 279C.335(2) and (5) and based on Oregon Administrative Rules, Chapter 137, Divisions 46 through 49.

The Board, acting as the LCRB for the ESD, has made the findings required by ORS 279C.330, ORS 279C.335 and ORS 279C.345, and determined that awarding a contract under this exemption is unlikely to encourage favoritism or substantially diminish competition and will likely result in a substantial cost savings and other substantial benefits to the ESD.

In approving a finding under this section, the local contract review board shall consider the type, cost and amount of the contract and, to the extent applicable to the particular public improvement contract or class of public improvement contracts, the following:

1. How many persons are available to bid;

2. The construction budget and the projected operating costs for the completed public improvements;
3. Public benefits that may result from granting the exemption;
4. Whether value engineering techniques may decrease the cost of the public improvement;
5. The cost and availability of specialized expertise that is necessary for the public improvement;
6. Any likely increases in public safety;
7. Whether granting the exemption may reduce risks to the district or the public that are related to the public improvement;
8. Whether granting the exemption will affect the sources of funding for the public improvement;
9. Whether granting the exemption will better enable the district to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement;
10. Whether granting the exemption will better enable the district to address the size and technical complexity of the public improvement;
11. Whether the public improvements involves new construction or renovates or remodels an existing structure;
12. Whether the public improvement will be occupied or unoccupied during construction;
13. Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions; and
14. Whether the district has or has retained under contract, and will use district personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the district will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

Only these findings are required for each class or individual contract exemption, unless the LCRB specifically excludes a finding or includes an additional finding.

Promulgation of these exemptions can only occur after public notification and a public hearing to receive testimony pertaining to draft exemptions and findings, pursuant to ORS 279C.335.

1. Brand Names or Products, “or Equal,” Single Seller and Sole Source
 - a. The ESD may purchase brand names or products from a single seller or sole source without competitive bidding subject to the limitations of this rule.
 - b. The ESD has determined that value engineering, specialized expertise required, public safety and technical complexity, generally do not apply to this exemption.
 - c. Solicitation specifications for public contracts of the ESD shall not expressly or implicitly require any product of any particular manufacturer or seller except as expressly authorized in subsections 1.d. and 1.e. of this rule.
 - d. The ESD may specify a particular brand name, make or product suffixed by “or equal,” “or approved equal,” “or equivalent,” “or approved equivalent” or similar language if there is no

other practical method of specification after documenting the procurement file with the following:

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- (1) A brief description of the solicitation(s) to be covered, including contemplated future purchases;
 - (2) Description of the brand name, mark or product to be specified; and
 - (3) A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:
 - (a) The use of the brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts; or
 - (b) Specification of the brand name, mark or product would result in substantial cost savings to the ESD; or
 - (c) There is only one manufacturer or seller of the product of the quality, performance or functionality required; or
 - (d) The efficient utilization of existing goods requires the acquisition of compatible goods and services.
 - (4) The ESD shall make reasonable effort to notify all known suppliers of the specified product and invite such vendors to submit competitive bids or proposals.

e. The ESD may purchase a particular product or service available from only one source, after documenting the procurement file with the ESD's findings of current market research to support the determination that the product is available from only one seller or source. The ESD's findings shall include:

- (1) A brief description of the contract or contracts to be covered, including contemplated future purchases;
- (2) Description of the product or service to be purchased; and
- (3) The reasons the ESD is seeking this procurement method, which shall include any of the following:
 - (a) That the efficient utilization of existing equipment, supplies or services requires the acquisition of compatible equipment, supplies or services; or
 - (b) That the goods or services required for the exchange of software or data with other public or private agencies are available for only one source; or
 - (c) That the goods or services are for use in a pilot or an experimental project; or
 - (d) Other findings that support the conclusion that the goods or services are available from only one source.
- (4) To the extent reasonably practical, the contracting agency shall negotiate with the sole source to obtain contract terms advantageous to the contracting agency.

f. The ESD may specify a product or service available from only one manufacturer but available through multiple sellers, after documenting the procurement file with the following information:

D

- (1) If the total purchase is over \$10,000 but does not exceed \$100,000, and a comparable product or service is not available under an existing state cooperative purchasing contract, competitive quotes shall be obtained by the ESD and retained in the procurement file; or
 - (2) If the amount of the purchase exceeds \$100,000, the product or service shall be obtained through competitive bidding unless a specific exemption is granted by the LCRB.
- g. If the ESD intends to make several purchases of the product of a particular manufacturer or seller for a period not to exceed five years, the ESD will so state in the solicitation file and in the solicitation document, if any. Such documentation shall be sufficient notice as to subsequent purchases. If the total purchase amount is estimated to exceed \$100,000, this shall be stated in the advertisement for bids or proposals.

Findings of Fact/Conclusion of Compliance with Law

It is unlikely that this process will encourage favoritism in the award of public contracts or substantially diminish competition for such contracts, as required by ORS 279C.335(2)(a).

This class exemption applies only to contracts under a limited dollar amount, and then, only after efforts to obtain competitive quotes are made, or other methods have been employed to ensure that competitive means are used if available. The ESD maintains open lists from which vendors are contracted for quotations. In addition, as required by ORS 279C.335(2)(b) award of a public contract subject to the above described exemption should likely result in substantial cost savings and other substantial benefits to the ESD by virtue of the ability to reduce solicitation costs when it is known that comparable products are not available, or when specifying another product solely to meet a competition requirement might lead to lower initial cost but longer lifetime cost.

2. Product Prequalification

- a. When specific design or performance specifications must be met or such specifications are impractical to create or reproduce for a type of product to be purchased, the ESD may specify a list of approved or qualified products by reference to the prequalified product(s) of particular manufacturers or vendors in accordance with the following product prequalification procedure:
 - (1) The ESD will make reasonable efforts to notify all known manufacturers and vendors of competing products of the ESD’s intent to compile a list of prequalified products. The notice will explain the opportunity manufacturers and vendors of competing products will have to apply to have their product(s) included on the ESD’s list of prequalified products. At its discretion, the ESD may provide notice by advertisement in a trade paper of general statewide circulation or other appropriate trade publication; or instead of advertising, the ESD may provide written notice to those manufacturers and vendors appearing on the appropriate list maintained by the ESD; and
 - (2) The ESD will accept manufacturer and vendor applications to include products in the ESD’s list of prequalified products up to 15 calendar days prior to the initial advertisement for bids or proposals for the type of product to be purchased, unless otherwise specified in the advertisement or in the ESD’s written notice.
- b. The ESD has determined that special expertise required, generally, does not apply to this rule.
- c. If the ESD denies an application for inclusion of a product on its list of prequalified products, the ESD shall promptly provide the applicant with a written notice of the denial and include

the reason for denial. The applicant may submit a written appeal within [seven] calendar days to the ESD business manager to request review and reconsideration of the denial.

D Findings of Fact

a. There are occasions when the ESD needs to establish a list of prequalified products before it invites bids or proposals to furnish the products. The ESD may have a specific performance or design need, but it is impractical for the ESD to create a specification for the type of products to be purchased. An example is audiovisual equipment. There is a tremendous variety of audiovisual products offered in the market. The equipment technology is complex and constantly changing. It would be very burdensome and time consuming for the ESD to generate nonbrand name, generic performance specifications for such equipment every time it wants to make a purchase.

Also, competition would be poorly served because bidders and proposers would not know in advance whether their offered product would meet the general specification substantially enough to be considered a responsive offer. The decision to make an award would be slow, because each product offered would have to be analyzed against the ESD's specification. Slowdown in the award process affects both bidders, who are asked to hold their bids open until award is made, and ESD programs, because staff are not able to order the equipment they need until the contract is awarded.

In this case, it might be more cost effective and efficient for the ESD to prequalify products and establish a list of approved products before invitations to bid are sent out. The prequalification process can be done some time before the need for a new contract. Once the prequalified product list is established, the bidding and contract award process can go quickly and smoothly.

- b. A second occasion when prequalification of products will be useful is when the specific design or performance specifications for a product are so exacting that the ESD must have time to carefully consider what is offered in the market that may or may not meet the specifications and, if necessary, reconsider its options before issuing an invitation to bid.
- c. This rule sets out a process of prequalification which requires the use of advertisement or other appropriate means to notify vendors of competing products of their opportunity to submit items for prequalification. The ESD maintains vendor mailing lists which are open to all interested vendors. The ESD uses these lists routinely to notify vendors of its intentions to prequalify products or to invite bids on products.
- d. This includes a 15-day time limit between the closure of a prequalification list and a related invitation to bid. This time factor ensures that vendors have a reasonable time to apply to include their products on a prequalified product list.
- e. Subsection c. of this rule provides vendors with an appeal process to follow if their application for prequalification is denied.

Conclusion of Compliance with Law

Where prequalification of products is appropriate, it is unlikely that this exemption will encourage favoritism in the awarding of public contracts or diminish competition for such contracts as required by ORS 279C.335(2)(a). There are several safeguards in the rule to prevent this, including notice, advertising, time and appeal process requirements to ensure that vendors are given a fair and open opportunity to participate in the prequalification process.

The prequalification of products process is a time-consuming effort for the ESD. It is not a shortcut procurement method. The ESD would use this method only after balancing cost-saving considerations, such as the ability of the ESD to create or generate nonbrand name generic specifications for types of products or the need for lengthy product evaluation prior to a contract award. If the prequalification method is chosen, it will likely result in a substantial cost savings and other substantial benefits to the ESD as required by ORS 279C.335(2)(b) because the normal method of product selection is too cumbersome and costly to pursue.

2. Requirements Contracts (Blanket Purchase Orders, Price)³

- a. The business manager, on behalf of the ESD, may establish requirements contracts for the purposes of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, combining ESD requirements for volume discounts, standardization among schools and departments and reducing lead time for ordering.
- b. The ESD has determined that value engineering, specialized expertise required and technical complexity, generally, do not apply to this rule.
- c. The ESD may enter into a requirements contract (also known as a blanket purchase order or price agreement) whereby it is agreed to purchase goods or services for an anticipated need at a predetermined price or price discount from a price list, provided the contract is led by a competitive procurement process pursuant to the requirements of the public contracting code and these rules.
- d. Once a requirements contract is established, schools and departments may purchase the goods and services from the awarded contractor without first undertaking additional competitive solicitation.
- e. Schools and departments shall use requirements contracts established by the ESD, unless otherwise specified in the contract, allowed by law or these rules or specifically authorized by the superintendent or designee.
- f. Under the authority of ORS 279A.025 and 279C.335, the ESD may use the requirements contracts entered into by another Oregon public agency when:
 - (1) The original contract met the requirements of the public contracting code; and
 - (2) The original contract allows other public agency usage of the contract; and
 - (3) The original public contracting agency concurs and this is documented by a written interagency agreement between the ESD and the agency.
- g. The term of any ESD requirements contract, including renewals, shall not exceed five years unless otherwise exempted pursuant to ORS 279C.335.

Findings of Fact

- a. This rule permits the ESD to enter into requirements contracts, in which the vendor agrees to provide specified goods and services over the term of the contract at the bid price or discount rate. A requirements contract is useful when the purchase of the goods or services are routine

³ The Oregon Procurement Information Network (ORPIN) allows authorized members to utilize the state's price agreement/contracts to purchase goods and services. Authorized ORCPP members can legally attach to a state price agreement and forego the competitive bid process. Access to hundreds of competitive price contracts for a wide variety of goods and services: vehicles, computers, furniture, copiers, fax machines, travel, pharmaceuticals, office products, etc., is available.

and repetitive. For example, school, office, custodial and facilities maintenance supplies are customarily purchased through requirements contracts.

- b. Requirements contracts are a common method of minimizing paperwork, achieving continuity of product, securing a source of supply, reducing inventory, obtaining volume discounts, standardizing usage among schools and departments and reducing lead time for ordering.
- c. The ESD establishes requirements contracts as a result of open competitive bidding or RFP processes, unless otherwise exempted.
- d. The ESD limits the term of requirements contracts, including all renewal options, to a maximum of five years before competitive rebidding must be done, unless otherwise exempted.
- e. The ESD may use the requirements contracts established by other public agencies, subject to certain conditions of state law, Board policy and administrative regulation.

Conclusion of Compliance with Law

It is unlikely that this exemption will result in favoritism in the awarding of public contracts or diminish competition for such contracts, as required by ORS 279C.335(2)(a). The ESD will only enter into requirements contracts which result from open competitive bidding processes. This condition applies also to the use of requirements contracts established by other public contracting agencies.

The awarding of ESD requirements contracts will likely result in a substantial cost savings and other substantial benefits to the ESD, as required by ORS 279C.335(2)(b). It would be costly and inefficient to make routine, repetitive purchases of goods and services through individual transactions. Also, the guaranteed volume of a requirements contract allows the ESD to get better prices from bidders.

2. Waiver of Bid Security Requirements (Public Improvement Contracts under \$100,000)

The LCRB may, at its discretion, waive the bid security requirements of ORS 279C.390, if the amount of the contract for the public improvement is less than \$100,000. Although the bid security requirements of ORS 279C.390 are waived for public improvement contracts under \$100,000, the ESD may impose a bid or quote security requirements for projects under \$100,000, when deemed to be in the best interest of the ESD.

Findings of Fact/Conclusion of Compliance with Law

This rule allows the LCRB to waive bid security requirements for certain public improvement contracts. Waiver of the bid security is provided for by statute without a requirement for findings.

3. Waiver of Performance and Payment Security Requirements (Public Improvement Contracts under \$100,000)

The LCRB may, at its discretion, waive the performance/payment security requirements of ORS 279C.390 if the amount of the contract for the public improvement is less than \$100,000. Although the performance/payment security requirements of ORS 279C.390 are waived for public improvement contracts less than \$100,000, the ESD may impose a performance/payment security requirement for projects less than \$100,000 when deemed to be in the best interest of the ESD.

Findings of Fact/Conclusion of Compliance with Law

This rule allows the LCRB to waive performance/payment security requirements for certain public improvement contracts. Waiver of the performance/payment security is provided for by statute without a requirement for findings.

4. Projects with Complex Systems or Components

- a. For contracts for public improvements with significant components that are inherently complex and are also complex to procure through competitive bid, the ESD may, at its discretion, use RFP competitive procurement methods subject to the conditions described in ORS 279C.400 and conditions enumerated in this exemption.
- b. Definitions. For purposes of this exemption only: “Complex Systems” are defined as those systems which incorporate the procurement of materials or other components which are difficult, if not impossible, to create in an “equal” specifications basis for competitive bid. Examples of such systems include but are not limited to, contracts for supplying and installing computerized controls for building heating, venting, air conditioning systems; and contracts for artificial surface outdoor multipurpose athletic fields. “Significant” is intended to mean something more than de minimis, but not necessarily the majority of the project as determined by cost.

Finding of Fact/Conclusion of Compliance with the Law

It is unlikely that this exemption will encourage favoritism in the awarding of the public contracts or substantially diminish competition for such contracts as required by ORS 279C.335(2)(a). Contracts for public improvements occasionally incorporate the procurement of systems, materials, or other components (complex systems) for which it is extremely difficult to design bid specifications. In these situations, utilization of an RFP process where each of the systems can be evaluated utilizing a number of factors, in addition to price, will likely result in substantial cost savings and other substantial benefits to the ESD as required by ORS 279C.335(2)(b).

The ORS 279C.400 enumerates how RFPs are to be used if authorized by the LCRB. These criteria ensure that competitive means will be used and selection will be fair and impartial. As a result, it is unlikely that this process will encourage favoritism in the awarding of public contracts or substantially diminish competition for such contracts as required by ORS 279C.335(2)(a). The awarding of contracts pursuant to this process will result in optimal value to the ESD based on selection by the ESD of the best competitive proposal that meets the stated evaluative criteria.

This class exemption is intended to be used for the types of procurements describe in the findings, where the specific system, materials or components represent a significant portion of the project. This class exemption is not intended to be used for CM/GC projects or other methods of alternative procurement unless these projects meet the requirements of this class exemption. The CM/GC and others, not meeting the requirements of this class exemption, may still be procured by RFP, provided that a project or contract specific exemption is promulgated by the LCRB.

Lane Education Service District

Code: DJC
Adopted:

Bidding Requirements (Version 2)

{Highly recommended policy. The Board serves as the Local Contract Review Board (LCRB) and has the ability to adopt its own procurement rules. Many ESDs choose to use the *Oregon Attorney General's Model Public Contracting Rules* in OAR Chapter 137, Divisions 045 - 049. If the LCRB does not adopt rules, the Attorney General's Model Public Contracting Rules apply. This policy is based on those rules. The LCRB may also include as part of its rules portions of the Oregon Department of Administrative Services administrative rules in OAR Chapter 125, Divisions 269 - 249. If the LCRB adopts its own rules, delete portions of this policy that are inconsistent with those rules.}

The Board is the Local Contract Review Board (LCRB) for the ESD. The LCRB has not adopted its own rules of procurement. Consequently, the *Oregon Attorney General's Model Public Contracting Rules*¹ shall apply to the ESD.²

Additionally, the ESD may include as part of its procedures portions of the Oregon Department of Administrative Services administrative rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 - 249.

The LCRB may make the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the ESD and made available on request.

The ESD may not artificially divide or fragment a procurement to reduce the procurement requirements.

The superintendent may develop administrative regulations or procedures to assist with the implementation of this policy and applicable procurement rules.

Goods and Services

The ESD will purchase goods and services through the following procedures, unless an exception applies:

1. **Small Procurement.** For purchases of goods and services with a contract price not exceeding \$25,000, the ESD can use any manner deemed practical or convenient, including direct selection or award. Amendments to a contract awarded through small procurement must be in accordance with OAR 137-047-0800.
2. **Intermediate Procurement.** For purchases of goods and services with a contract price exceeding \$25,000, but not exceeding \$250,000, the ESD shall seek at least three informally solicited competitive price quotes or competitive proposals from prospective contractors. The ESD will keep record of the request and quotes. If three quotes are not reasonably available, fewer will suffice, but the ESD will make a written record of the effort made. The ESD may negotiate with a prospective

¹ Oregon Administrative Rules (OAR) 137-045 - 049

² See ORS 279A.065(5). {The LCRB can formally adopt the AG rules. If the LCRB formally adopts the rules, the ESD is required to review the AG rules each time there is a modification.}

contractor to clarify the quote or offer, or to effect modifications. Amendments to a contract awarded through intermediate procurement must be in accordance with OAR 137-047-0800.

3. Regular Procurement. For purchases exceeding \$250,000, the ESD will use competitive sealed bids (OAR 137-047-0255) or competitive sealed proposals (OAR 137-047-0260). Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-047-0800.
4. Emergency Procurements. In situations of emergency³, the LCRB or designee may authorize an emergency procurement. In an emergency procurement, the ESD is not required to follow general procurement requirements. The ESD must ensure competition for the contract that is reasonable and appropriate under the circumstances. The ESD must document the nature of the emergency and the method used for the selection of the contractor.
5. Sole-source Procurements. If the LCRB or designee determines that the goods or services are available from only one source, the ESD may award a contract without competition. To the extent reasonably practicable, the ESD shall negotiate with the sole source to obtain contract terms that are advantageous to the ESD. The determination of sole source must be based on written findings and may include:
 - a. That the efficient utilization of existing goods requires acquiring compatible goods or services;
 - b. That the goods or services required to exchange software or data with other public or private agencies are available from only one source;
 - c. That the goods or services are for use in a pilot or experimental project; or
 - d. Other findings that support the conclusion that the goods or services are available from only one source.⁴
6. Special Procurements. “Special procurement” means a contract or class of contracts that use a contracting procedure other than competitive sealed proposals, competitive sealed bidding, small procurement or intermediate procurement. Special procurements require LCRB approval and will be conducted in accordance with ORS 279B.085, OAR 137-047-0285[, and] this policy [and administrative regulation DJC-AR - Exemptions from Competitive Bidding and Special Procurement].^{5}
7. Personal Services Contracts. “Personal services contract,” as used in this policy, means a contract whose primary purpose is to acquire specialized skills, knowledge and resources in the application of technical or scientific expertise, or the exercise of professional, artistic or management discretion or judgment.⁶ Unless otherwise designated by the LCRB, personal services contracts will be procured

³ “Emergency” means circumstances that:

1. Could not have been foreseen;
2. Create a substantial risk of loss, damage or interruption of services or a substantial threat to property, public health, welfare or safety; and
3. Require prompt execution of a contract to remedy the condition.

⁴ If the contract does not exceed \$250,000, using intermediate procurement is likely less burdensome than sole source.

⁵ {If the LCRB has designated contracts or classes of contracts as special procurements, include this information along with reference to the LCRB action.}

⁶ This includes, but is not limited to, contracts for the services of an accountant, physician or dentist, educator, consultant (including a provider under an Architectural and Engineering Service Contract), broadcaster, or artist (including a photographer, filmmaker, painter, weaver or sculptor (OAR 137-045-0010(19))). Also includes architectural, engineering, photogrammatic

in accordance with applicable procurement laws. The LCRB may designate certain service contracts or classes of service contracts as personal services contracts and exempt them from competitive bidding.^{7} All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price. Personal service contractors may be required to qualify as independent contractors in accordance with applicable laws.⁸

Procurements for services estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process in accordance with ORS 279B.030.

Public Improvements

“Public improvement” means a project for construction, reconstruction or major renovation on real property by or for the ESD.⁹ The ESD will contract for public improvements using the following procedures, unless an exception applies.

1. Public improvements contracts with a value of less than \$25,000 are exempt from competitive bidding.
2. Intermediate Procurements. For public improvement contracts not exceeding \$100,000, the ESD may utilize three quotes¹⁰:
 - a. The request for the quotes shall be in writing (unless not reasonably practicable)¹¹;
 - b. The request for quotes shall include the selection criteria and if the criteria are not of equal value, their relative value or ranking.

The ESD shall award the contract to the prospective contractor whose quote will best serve the interest of the ESD, based on the selection criteria. If the award is not made to the offeror and quote with the lowest price, the ESD will make a written record of the basis for the award. Amendments to a contract awarded via intermediate procurement may be increased in accordance with OAR 137-049-0160(6)-(7).

3. Regular Procurements. For purchases exceeding \$100,000, the ESD will use invitation to bid or request for proposals except as otherwise allowed by law. See OAR 137-049-0130 and OAR 137-

mapping, transportation planning or land surveying services procured under ORS 279C.105 (ORS 279C.100) and related services procured under ORS 279C.120 (ORS 279C.100(5)).

⁷ {If the LCRB has designated contracts or classes of contracts as personal services contracts, include this information along with reference to the LCRB action.}

⁸ See ORS 670.600 and OAR 459-005-0020.

⁹ Public improvement does not include:

1. Projects for which no funds of the ESD are directly or indirectly used, except for participation that is incidental or related primarily to project design or inspection; or
2. Emergency work, minor alternation, ordinary repair or maintenance necessary to preserve a public improvement.

¹⁰ If three quotes are not reasonably available, the ESD shall make a written record of the effort made to obtain these quotes.

¹¹ For Public Works Contracts, oral quotations may only be utilized in the event that written copies of prevailing wage rates are not required by the Bureau of Labor and Industries.

049-0640. Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-049-0910.

4. **P** Emergency Procurements. Emergency contracts for construction services are not considered public improvement contracts and will be procured in accordance with OAR 137-049-0140 and OAR 137-049-0150.
5. **R** Community Benefit Contracts. “Community benefit contract” means a public improvement contract that includes, but is not limited to, terms and conditions that require the contractor to:
 - a. **O** Qualify as a training agent, as defined in ORS 660.010, or provide apprenticeship training that meets applicable federal and state standards for apprenticeship training;
 - b. Employ apprentices to perform a specified percentage of work hours that workers in apprenticeable occupations perform on the community benefit project;
 - c. Provide employer-paid family health insurance; and
 - d. Meet any other requirements that the LCRB sets forth.

Community benefits contracts may be procured in accordance with ORS 279C.308.

6. **P** Construction Manager/General Contractor (CM/GC) Procurement. The ESD shall procure CM/GC services in accordance with model rules the Attorney General adopts under Oregon Revised Statute (ORS) 279A.065(3) and OAR 137-049-0690, which requires “the assistance of legal counsel with substantial experience and necessary expertise in using the CM/GC Method, as well as knowledgeable staff, consultants or both staff and consultants who have demonstrated capability of managing the CM/GC process in the necessary disciplines of engineering, construction scheduling and cost control, accounting, legal, Public Contracting and project management.”

END OF POLICY

Legal Reference(s):

[ORS Chapter 279](#)
[ORS Chapter 279A](#)
[ORS Chapter 279B](#)
[ORS Chapter 279C](#)

[ORS 670.600](#)
[OAR Chapter 125](#), Divisions 246 -
249

[OAR Chapter 137](#), Divisions 045 -
049
[OAR 459-005-0020](#)

[OREGON PROCUREMENT MANUAL](#), Oregon Department of Administrative Services.

Lane Education Service District

Code: DJC-AR
Revised/Reviewed:

Exemptions from Competitive Bidding and Special Procurements (Version 2)

{This optional administrative regulation is intended to provide guidance for the ESD in preparing a request for special procurement to the Local Contract Review Board (LCRB). This administrative regulation is not intended as procurement rules in place of the *Attorney General's Model Public Contracting Rules* or rules adopted by the LCRB.}

All public contracts shall be based upon competitive bids or proposals, except the following:

1. Contracts below threshold levels in accordance with ORS 279B.065 (small procurements for goods and services), 279B.070 (intermediate procurements for goods and services) and 279C.412 (intermediate procurements for public improvements);
2. Special procurements for goods and services in accordance with ORS 279B.085 and OAR 137-047-0285;¹
3. Contracts which have been exempted under ORS 279A.025 and 279C.335; and
4. Any other contract exempted by law.

SPECIAL PROCUREMENTS FOR GOODS AND SERVICES

To proceed with a special procurement, the ESD shall submit a written request to the Board, acting as the Local Contract Review Board (LCRB). This request shall describe the contracting procedure, the goods and services or class of goods and services that are the subject of the special procurement, and circumstances that justify the use of a special procurement.

The special procurement must be unlikely to encourage favoritism in the awarding of a public contract or to substantially diminish competition for public contracts; and (A) must be reasonably expected to result in substantial cost savings to the ESD or to the public; or (B) must substantially promote the public interest in a matter that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065, 279B.070 or any related rules.

After LCRB approval, the ESD may proceed with a special procurement. Public notice of the approval of a special procurement must be given in the same manner as provided in ORS 279B.055(4). If the ESD intends to award a contract through special procurements that calls for competition among prospective contractors, the ESD shall award the contract to the contractor it determines to be most advantageous to the ESD.

When the LCRB approves a class special procurement the ESD may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for a special procurement.

¹ Procurement law for goods and services uses the term “special procurement.” Procurement law for public improvement contracts does not use the term “special procurement,” but a comparable exemption is allowed under ORS 279C.335.

The following are additional considerations and requirements for specific types of special procurements. The request submitted to the LCRB should address these provisions and satisfy any requirements.

Brand Names or Equal²

1. “Brand name or equal specification” means a specification that uses one or more manufacturers’ names, makes, catalog numbers or similar identifying characteristics needed to meet the ESD’s requirements and that authorizes bidders or proposers to offer goods or services that are equivalent or superior to those named or described in the specification.
2. “Brand name specification” means a specification limited to one or more products, brand names, makes, manufacturer’s names, catalog numbers or similar identifying characteristics.”
3. “Specification” means any description of the physical or functional characteristics of, or of the nature of, goods or services to be procured by a contracting agency.³

A brand name or equal specification may be used when the use of a brand name or equal specification is advantageous to the ESD because the brand name describes the standard of quality, performance, functionality and other characteristics of the product needed by the ESD. The ESD is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final. Nothing in the law or this administrative regulation may be construed as prohibiting the ESD from specifying one or more comparable products as examples of the quality, performance, functionality or other characteristics of the product needed by the contracting agency.

A brand name specification may be prepared and used only if the ESD determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the ESD based on one or more of the following written determinations:

1. That use of the brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts;
2. That use of a brand name specification would result in substantial cost savings to the contracting agency;
3. That there is only one manufacturer or seller of the product of the quality, performance or functionality required; or
4. That efficient utilization of existing goods requires the acquisition of compatible goods or services.

Advertising Contracts, Purchase of⁴

The ESD traditionally purchases advertising in newspapers, however, the ESD may also purchase advertising in other media, such as radio, television or the internet. Advertising contracts may be procured without competitive procurement based on findings of:

² For additional guidance, see OAR 125-247-0691.

³ Specification may include a description of any requirement for inspecting, testing or preparing goods or services for delivery.

⁴ See OAR 125-247-0288(5) for additional guidance.

1. Advertisements are placed in a particular source because of the specific audience that source serves;
2. Competition to furnish advertising space in daily newspapers of general, trade or business circulation in the vicinity of the ESD is limited;
3. Cost savings are difficult to quantify where the sources are unique and not interchangeable;
4. Advertisements may be placed to satisfy legal notice or Board policy requirements;
5. Other published advertisements or notices, such as routine public notices, personnel recruitment information, etc., are placed in one or more of the publications of general circulation in the local area and other publications, as appropriate;
6. The communities served by the ESD rely upon its use of the local daily newspaper as a central source of news and information regarding ESD activities; or
7. It is unknown whether contracts for advertisements placed with radio, television, the internet or other media are going to result in cost savings if not placed for competitive bid or request for proposal (RFP). If possible, savings could be obtained through competitive means, the ESD would attempt to obtain competitive quotes or bids, as appropriate.

Advertising Contracts, Sale of

The ESD may sell advertising for ESD publications and activities, regardless of a dollar amount, without competitive bidding, including school newspapers, yearbooks, athletic programs, drama or music programs and the like.

Sales of advertising for student activities are generally other fund revenues, where student groups solicit advertisements from local businesses to help with the cost of the activity itself. A common example is the sale of advertising in school newspapers and yearbooks. The ESD itself would not achieve any increased revenue to the General Fund by seeking competitive bids or proposals for such advertising. This holds true for other student activities, such as athletics, drama or music events and the like.

Equipment Repair and Overhaul⁵

The ESD may enter into a public contract for equipment repair or overhaul without competitive bidding when competitive procurement is not practical. This may include when service or parts required are unknown and the cost cannot be determined without extensive preliminary dismantling or testing, or service or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source. The ESD will use a competitive procedure to the extent practicable.

If the repair or overhaul qualifies as an emergency, the ESD may use emergency procurement procedures.

Copyrighted Materials

Contracts for the procurement or distribution of textbooks are exempt from public procurement requirements. Purchase of copyrighted materials available from only one source may be procured through

⁵ For additional guidance, see OAR 127-247-0288(6).

the sole source procedures. Requests for special procurement approval for the purchase of other copyrighted materials may be submitted to the LCRB with supporting information.

Used Personal Property or Equipment, Purchase⁶

The ESD may purchase used property or equipment without obtaining competitive bids or quotes, if at the time of purchase, the LCRB has determined that the purchase will result in substantial cost savings to the ESD or promote the public interest and will unlikely diminish competition or encourage favoritism. “Used personal property or equipment” is property or equipment which has been placed in its intended use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used,” at the time of ESD purchase.

Information Technology and Telecommunication Contracts⁷

The ESD may enter into a contract to acquire information technology hardware and software and services (including telecommunications) without competitive bidding if, the LCRB has determined that the purchase will result in substantial cost savings to the ESD or promote the public interest and will unlikely diminish competition or encourage favoritism.

Renegotiation of Existing Contracts with Incumbent Contractors

The ESD may amend or renegotiate contracts with existing vendors, service providers or other parties in accordance with OAR 137-047-0800.

EXEMPTIONS FOR PUBLIC IMPROVEMENT CONTRACTS

Oregon law⁸ allows for exceptions to competitive bidding for public improvement contracts or classes of contracts when the LCRB approves findings that:

1. The exemption is unlikely to encourage favoritism in awarding public improvement contracts or substantially diminish competition for public improvement contracts; and
2. Awarding a public improvement contract under the exemption will likely result in substantial cost savings and other substantial benefits to the ESD.

In approving a finding, the LCRB shall consider the type, cost and amount of the contract and, to the extent applicable to the particular public improvement contract or class of public improvement contracts, the following:

1. How many persons are available to bid;

⁶ For additional guidance, see OAR 125-247-0288(10). When contracting with another governmental entity, a ESD has a statutory exception under ORS 279A.025. The ESD may purchase state/federal surplus property through the Department of Administrative Services, State Services Division for Surplus Property. For more information on this program, contact DAS at 503-378-4714.

⁷ For additional guidance, see OAR 127-247-0185.

⁸ See ORS 279C.335.

2. The construction budget and the projected operating costs for the completed public improvement;
3. Public benefits that may result from granting the exemption;
4. Whether value engineering techniques may decrease the cost of the public improvement;
5. The cost and availability of specialized expertise that is necessary for the public improvement;
6. Any likely increases in public safety;
7. Whether granting the exemption may reduce risks to the contracting agency, the state agency or the public that are related to the public improvement;
8. Whether granting the exemption will affect the sources of funding for the public improvement;
9. Whether granting the exemption will better enable the contracting agency to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement;
10. Whether granting the exemption will better enable the contracting agency to address the size and technical complexity of the public improvement;
11. Whether the public improvement involves new construction or renovates or remodels an existing structure;
12. Whether the public improvement will be occupied or unoccupied during construction;
13. Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions; and
14. Whether the contracting agency or state agency has, or has retained under contract, and will use contracting agency or state agency personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the contracting agency or state agency will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

In granting this exemption, the LCRB shall:

1. If appropriate, direct the use of alternative contracting methods that take account of market realities and modern practices and are consistent with the public policy of encouraging competition;
2. Require and approve or disapprove written findings by the ESD that support awarding a particular public improvement contract or a class of public improvement contracts, without the competitive bidding requirements. The findings must show that the exemption complies with the requirements outlined in this administrative regulation; and
3. If the procurement involves construction manager/general contractor services, require the ESD conduct the procurement in accordance with OAR 137-049-0690.

Notification of a proposed exemption under this section must be published in at least one trade newspaper of general statewide circulation a minimum of 14 days before the date on which the LCRB intends to take

action to approve or disapprove the exemption. The notice must state that in response to a written request, the ESD will hold a public hearing for the purpose of taking comments on the draft findings for an exemption from the competitive bidding requirement.⁹ If a hearing is held, the ESD shall offer an opportunity for any interested party to appear and comments. If the ESD must act promptly because of circumstances beyond the ESD's control that do not constitute an emergency, notification of the proposed exemption may be published simultaneously with the ESD's solicitation of contractors, as long as responses to the solicitation are due at least five days after the agency intends to take action to approve or disapprove the proposed exemption.

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⁹ The ESD may hold a hearing even if there is no written request.

Lane Education Service District

Code: DJCA
Adopted: 3/21/06
Orig. Code(s): DJCA

Personal Services Contracts

The district may enter into personal services contracts with qualified professionals as provided by ORS 279A.055. Personal services contracts, as used in this policy, means contracts for specialized skills, knowledge and resources in the application of highly technical or scientific expertise or the exercise of professional, artistic or management discretion or judgment. The district may enter into a personal services contract with a current district employee only when the individual meets independent contractor status in accordance with state, Public Employees Retirement System (PERS) and Internal Revenue Service (IRS) requirements.

Selection of a personal services contractor will be based primarily on qualifications and performance history, expertise, knowledge and creativity and the ability to exercise sound professional judgment.

All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price.

Contracts for personal services in excess of \$25,000 shall require prior Board approval.

The superintendent will develop administrative regulations as necessary to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS Chapters 279, 279A, 279B and 279C](#)

[ORS 332.107](#)
[ORS 670.600](#)

[OAR 459-010-0030](#)

INTERNAL REVENUE SERVICE, PUBLICATION 1779: INDEPENDENT CONTRACTOR OR EMPLOYEE (2005).

Lane Education Service District

Code: DK
Adopted: 12/11/01
Orig. Code(s): DK

Payment Procedures

(If new language is added to DJ as proposed, is this still needed?)

All claims for payment from Lane ESD funds will be processed by the business office in conformance with ESD procedures. Payment will be authorized against invoices properly supported by approved purchase orders, with properly submitted vouchers, or in accordance with salaries and salary schedules approved by the Board.

The superintendent will be responsible for assuring that budget allocations are observed and that total expenditures do not exceed the amount allocated in the budget.

END OF POLICY

Legal Reference(s):

[ORS 294.305 - 294.565](#)

[ORS 328.460](#)

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Lane Education Service District

Code: DLC
Adopted: 5/24/94
Readopted: 12/11/01
Orig. Code(s): DLC

Expense Reimbursement

It is the policy of the Board to provide for the payment or reimbursement of actual and necessary expenses incurred by employees in the course of performing the duties and providing the services required, when such expenses are in accordance with Lane ESD rules and the law and are duly authorized by the appropriate administrator.

The superintendent or designee will develop administrative regulation to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS 294.155](#)

[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)

I.R.C. § 162 (2006); Business Expenses, 26 C.F.R. 1.162-1 (2006).

INTERNAL REVENUE SERVICE, PUBLICATION 463: TRAVEL, ENTERTAINMENT, GIFT AND CAR EXPENSES.

Lane Education Service District

Code: DN
Adopted:

Disposal of ESD Property (Version 1)

The Board may, at any time, declare ESD property as surplus and authorize its disposal when such property is no longer useful to the ESD, unsuitable for use, too costly to repair or obsolete.

If reasonable attempts to dispose of surplus properties fail to produce a monetary return to the ESD, the Board may dispose of them in another manner.

If the ESD property was purchased with state, federal or private grant funds, disposal of the property shall be made as outlined in the grant or by state or federal regulations.

END OF POLICY

Legal Reference(s):

[ORS 279B.055](#)

[ORS 279A, 279B and 279C](#)

[ORS 334.125](#)

EDUCATION, TITLE 34 C.F.R. PART 80 § 80.32(e).

Description of Need & Background:

Educator retention, particularly among educators of color, special education teachers, and early-career educators, remains a persistent challenge across Oregon. A regional survey focused on teacher retention would elevate educator voice, support engagement, and provide actionable data to improve educator retention across Lane, Linn, Benton, and Lincoln counties.

Staff feedback helps districts understand how educators experience the work environment and identify strengths and areas for improvement. The data can be used for transparent decision-making, collective action planning, and continuous improvement efforts. While national norms are useful, regional comparisons between similarly sized and demographically matched districts offer greater relevance and value for local decision-making.

Why Upbeat?:

Upbeat is a unique education research and consulting firm staffed by former educators and school leaders. Its comprehensive, research-backed offerings and region-specific comparisons are designed exclusively to predict and improve teacher retention. WREN, which supports Lane and LBL ESDs, will have access to comparative data across the 28 local/regional districts for action planning, collaboration, and professional learning specific to teacher retention. This aligns with Lane ESD and Western Regional Educator Network (WREN) teacher retention goals.

Services and Supports:

- **Specialized Survey Design**
 - Provides a predictive algorithm that measures an employee's level of engagement with their school/District through Upbeat's Teacher Engagement Score. This measurement has a correlation to the teacher's decision to stay or leave their school. The higher an individual's engagement score, the more likely a teacher is to stay. The lower the employee's engagement score, the more likely they are to leave their school. All engagement scores are reported in groups of four or more to individual school and district leaders. School and district leaders can use the average engagement score to understand what level of teacher turnover to expect at an individual school or across the district.
 - Provides a predictive algorithm that measures an employee's level of engagement with their school/District through Upbeats' Teacher Engagement score. School and district leaders can use the average engagement score to understand what level of teacher turnover to expect at an individual school or across the district.
 - Customizable content, available in English and Spanish
 - Exit Survey conducted independently (secure third party) to encourage candid responses
- **Survey Administration**

- Biannual survey administration for both licensed and classified staff (fall and spring)
- Timely data turnaround (within 2 weeks)
- Upbeat does the bulk of the communication with the staff
- **Actionable Data Tools**
 - One-of-a-kind, unique, and original comparison index that allows a district to view its teacher engagement data in comparison to both overall averages and averages of similar districts
 - Regional norms tailored to Lane, Linn, Benton, and Lincoln counties
 - An interactive built-in analytics dashboard with demographic filters
 - Retention tracker uses HR data and reports turnover rates by school, role, experience level, subject, race, and other demographics in order to monitor trends, equity gaps
 - Comparison data from over 42,000 teachers in 26 states
 - Links survey results to actual retention outcomes
- **Capacity-Building Supports**
 - Leadership action planning sessions
 - Principal coaching for small districts
 - Option to add on additional coaching supports for larger districts
 - Key findings presentation deck and interpretation guides
 - Participation in Upbeat's National Working Group on Teacher Retention

Proven Results:

- Schools using Upbeat report an average 1.7 percentage point increase in retention
- Upbeat estimates an average savings of \$374,000 per district due to reduced turnover

Pricing Advantages:

- Costs are fair and reasonable
- Approx. 40% cost savings for our region
- Two-year discount and sliding scale based on school count
- Up to 230 schools included
- Other organizations were also considered, but they could not provide the same services with teacher retention specificity as listed above

Lane Education Service District

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The following symbol is used on some policies:

** As used in this policy, the term parent includes legal guardian or person in a parental relationship. The status and duties of a legal guardian are defined in ORS 125.005(4) and 125.300-125.325. The determination of whether an individual is acting in a parental relationship, for purposes of determining residency, depends on the evaluation of the factors listed in ORS 419B.373. The determination for other purposes depends on evaluation of those factors and a power of attorney executed pursuant to ORS 109.056. For special education students, parent also includes a surrogate parent, an adult student to whom rights have transferred and foster parent as defined in OAR 581-015-2000.

Lane Education Service District

Code: EB
Adopted: 3/29/94
Readopted: 1/22/02
Orig. Code(s): EB

Safety Program

The Board recognizes its responsibility for the safety of students, Lane ESD employees and others citizens while they are on and in the facilities of the ESD.

~~The Board shall provide, publish and post rules for safety and the prevention of accidents; shall ensure that students, teachers and other staff members are instructed in safety and accident prevention; shall provide protective devices where they are required for the safety of students and employees and shall provide suitable and safe equipment for the conduct of the program and the operation of the ESD. It shall be the policy of the Board to carry out the intent of the Oregon Safe Employment Act.~~

~~The superintendent shall prepare rules governing safety and the prevention when possible of accidents, Safe buildings, grounds and equipment will be maintained in order to prevent accidents or injury to students, employees and others from fire, natural disasters, mechanical and electrical malfunction, natural disasters and other hazards which shall include as a minimum the requirements of law and the applicable rules and regulations of various departments of state government. He/She shall appoint a staff member as safety officer, charged with responsibility for implementing the ESD's safety program.~~

Buildings will be planned, equipped and maintained in accordance with appropriate local, state and federal safety regulations.

Buildings will be provided with alarm systems, fire extinguishers and other safety devices required by state and federal laws and regulations.

The superintendent will develop and implement a safety program which will include, but not be limited to, compliance with and enforcement of all state and federal laws, rules and regulations. [The superintendent shall appoint a staff member as safety officer, charged with responsibility for implementing the ESD's safety program.] ~~[The superintendent is appointed as safety officer and is charged with responsibility for implementing the ESD's safety program.]~~

END OF POLICY

Legal Reference(s):

[ORS 654.003 to -654.022](#)

[OAR 437-001-0760](#)

[OAR 437-002-0020 to -0081](#)

[OAR 437-002-0100](#)

[OAR 437-002-0140](#)

[OAR 437-002-0144](#)

[OAR 437-002-0145](#)

[OAR 437-002-0180 to -0182](#)

[OAR 437-002-0260 to -0268](#)

[OAR 437-002-0360](#)

[OAR 437-002-0368](#)

[OAR 437-002-0377](#)

[OAR 437-002-0390](#)

[OAR 437-002-0391](#)

[OAR 581-024-0275](#)

Fazzolari v. Portland Sch. Dist. No. 1J, 303 Or. 1 (1987).
Toxic Substances Control Act, 15 U.S.C. §§ 2601-2629 (2006); Asbestos Hazard Emergency Response Act of 1986, 15 U.S.C. §§ 2641-2656 (2006).

Lane Education Service District

Code: EB-AR(1)
Adopted: 4/15/94
Readopted: 4/23/02
Orig. Code(s): EB-AR(1)

Reporting of Hazards

(This does not usually rise to the level of AR. Internal procedure? Is it current?)

Before purchases or requisitions of any chemical which is a physical or health hazard can be made by any ESD personnel, a Material Safety Data Sheet (MSDS) from the supplier must be on file with the facilities manager, ESD front desk and in the work area that the material will be used.

When the purchase or requisition is made, the purchaser must do the following:

1. Request that the supplier provide a National Fire Protection Association (NFPA) label as specified in the Material Hazard Analysis (MHA) on each package shipped;
2. Request an MSDS from the supplier;
3. File the forms in the appropriate binders.

Definitions

1. Health Hazard: A chemical for which there is statistically significant evidence based at least on study conducted in accordance with established scientific principles that acute or chronic health effects may occur in exposed employees. The term "health hazard" includes chemicals which are carcinogens, toxic or highly toxic agents, reproductive toxins, irritants, corrosives, sensitizers, hepatotoxins, nephrotoxins, neurotoxins, agents which act on the hematopoietic system and agents which damage the lungs, skin, eyes or mucous membranes.
2. Physical Hazard: A chemical for which there is scientifically valid evidence that it is a combustible liquid, a compressed gas, explosive, flammable, an organic peroxide, an oxidizer, pyrophoric, unstable (reactive) or water-reactive.

Container Labeling

1. The supervisor of each work area shall verify that all containers received for use will:
 - a. Be clearly labeled as to the contents;
 - b. Note the appropriate hazard warning;
 - c. List the name and address of the manufacturer.
2. The supervisor of each work area will ensure that all secondary containers are labeled with either an extra copy of the original manufacturer's label or with a locally produced label listing all the hazard warnings of the original label.
3. The supervisor of each work area will review the labeling requirements every month and update as required.

Written Hazard Communication Forms

1. The supervisor of each work area will be responsible for obtaining and maintaining the Material Hazard Analysis (MHA) sheets.
2. The supervisor of each work area will review incoming Material Hazard Analysis sheets for new and significant health/safety information. They shall see that any new information is passed on to the affected employees.
3. Copies of Material Safety Data Sheets (MSDS's) for all hazardous chemicals to which employees may be exposed will be kept in the administrative services area.
4. MSDS's will be available to all employees at the ESD front desk and that information contained on the MSDS's will be provided to the work areas by means of the Material Hazard Analysis Sheet. If MHA sheets are not available for new chemicals in use, contact Coop Purchasing.
5. A written description identifying chemical composition and hazards of each hazardous waste shall be provided to the facilities manager.

List of Hazardous Chemicals

1. A comprehensive listing of all known hazardous chemicals shall be compiled and kept by the facilities manager. Information on each listed chemical can be obtained by reviewing the MHA sheet located in the work area and the MSDS located at the ESD front desk.

Hazardous Nonroutine Tasks

1. Periodically, employees are required to perform hazardous nonroutine tasks. Prior to starting work on such projects, each involved employee will be given information by the work area supervisor about hazardous chemicals to which they may be exposed during such activity.
2. Examples of nonroutine tasks performed by employees:
 - a. Cleaning up hazardous materials spills.

INFORMING CONTRACTORS

In the Building

1. It is the responsibility of the administrator to provide outside contractors with the following information concerning operations:
 - a. Hazardous chemicals to which contractor personnel may be exposed while performing work within the building;
 - b. Precautions the employees may take to lessen the possibility of exposure by usage of appropriate protective measures.
2. Contractors shall provide the facilities manager with an MSDS for all hazardous materials to be brought on board before work is to commence.

Outside the Building

1. Each contractor shall establish a hazard control zone for outside work. It is the responsibility of the contractor to protect and inform all personnel entering the contractor's control zone as required by state and federal regulations.

Employee Training and Information

1. The safety committee is responsible for the Hazardous Materials employee training program. The committee will make sure that all elements specified below are carried out.
2. Prior to starting work each new employee will receive information and training on the following:
 - a. Chemicals present in their workplace operations;
 - b. Location and availability of this written hazard communication program;
 - c. Physical and health effects of the hazardous chemicals;
 - d. Methods and observation techniques used to determine the presence or release of hazardous chemicals in the work area;
 - e. Emergency procedures to follow if they are exposed to these chemicals;
 - f. How to read labels and review MHA sheets and MSDS's to obtain appropriate hazard information;
 - g. Location of MSDS file and location of hazardous chemical list.
3. After attending the training class, each employee will sign a form to verify that he/she has attended the training and understand the policy on hazardous chemicals and the hazard communication

program.

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Lane Education Service District

Code: EB-AR(2)
Adopted: 8/17/94
Readopted: 4/23/02
Orig. Code(s): EB-AR(2)

Lockout/Tagout Regulations

(This does not usually rise to the level of AR. Internal procedure? Is it current?)

Lane ESD shall establish a program consisting of energy control procedures, employee training and periodic inspections. The program will ensure that before any employee performs any servicing or maintenance on a machine or equipment, the machine or equipment shall be isolated from the energy source and rendered inoperative.

To further the ESD's effort to protect employees from harm, the following regulation has been established:

All power equipment shall be completely isolated from all power during servicing and maintenance. This will be accomplished by affixing appropriate lockout or tagout devices to energy isolating devices. Machines and equipment will all be disabled to further prevent unexpected energization, start-up or release of stored energy. This will be done for the purpose of preventing injury to all employees during servicing or maintenance of power equipment.

1. Responsibility and Training

- a. Authorized employees are those employees authorized to implement the lockout/tagout procedure.

Each authorized employee will receive training in the recognition of applicable hazardous energy sources, the type and magnitude of the energy available in the workplace and the methods and means necessary to obtain a "Zero Energy State."

- b. Affected employees are those employees who operate equipment from which power may be isolated so that servicing can be performed or who work in areas where servicing will be performed on energy-isolated equipment. Each affected employee will be instructed in the purpose and use of the energy control procedure.
- c. Other employees whose work operations are or may be in an area where energy control procedures may be utilized will be instructed about the procedure and about the prohibition relating to attempts to restart or re-energize machines or equipment which are locked out or tagged out.

Employees will also be trained in the following limitations of tags:

- a. Tags are essentially warning devices affixed to energy-isolating devices and do not provide the physical restraint on those devices that is provided by a lock;
- b. When a tag is attached to an energy-isolating device, it is not to be removed without approval of the authorized person responsible for it and it is never to be bypassed, ignored or otherwise defeated;
- c. Tags will be legible and understandable by all authorized employees, affected employees and all other employees whose work operations are or may be in the area, in order to be effective;

- d. Tags and their means of attachment will be made of materials which will withstand the environmental conditions encountered in the workplace;
- e. It is important that tags do not evoke a false sense of security. To avoid this, their meaning needs to be understood as part of the overall energy control program;
- f. Tags will be securely attached to energy-isolating devices so that they cannot be inadvertently or accidentally detached during use.

2. Periodic Inspection

Period inspections of the energy control procedure will be conducted at least annually to ensure the procedure and the requirements are being followed.

- a. The periodic inspection will be performed by a designated management representative other than the one(s) utilizing the energy control procedure being inspected.
- b. The periodic inspection is designed to correct any deviations or inadequacies observed.
- c. Where lockout is used for energy control, the periodic inspection will include a review, between the inspector and each authorized employee, of that employee's responsibilities under the energy control procedure being inspected.
- d. Where tagout is used for energy control, the periodic inspections will include a review, between the inspector and each authorized and affected employee, of that employee's responsibilities under the energy control procedure being inspected and the elements set forth under Responsibilities and Training.

The consequences of deviating from provisions in this rule can be severe in terms of human suffering and loss. Deviations from these procedures will include a determination of how to improve the procedures so

that no future deviations will occur.

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Lane Education Service District

Code: EB-AR(3)
Adopted: 1/10/96
Readopted: 4/23/02
Orig. Code(s): EB-AR(3)

Holiday Decorations

(This does not usually rise to the level of AR. Internal procedure? Is it current?)

Decorations may be used in Lane ESD buildings in accordance with Oregon Fire Safety Regulations. The following guidelines are to be used:

1. Candles or any other sources of open flame are not allowed;
2. Decorative lighting may be used only under the following conditions:
 - a. All decorative lighting shall conform to the Uniform Fire and Electrical Code;
 - b. Miniature electrical lights and decorations may be used in work area decorations and on trees under six feet tall. Lights must be UL-listed and in perfect condition. Only UL-listed heavy-duty extension cords in perfect condition with built-in overload protection may be used;
 - c. Electrical decorations may not be used on artificial metallic trees or decorations or on trees over six feet tall.
3. All decorations shall be either inherently fire retardant or treated with a flame-retardant to be flame resistant. Decorations shall not exceed 20 percent of a wall or door;
4. Christmas trees shall not be placed in any required exit path and shall be mounted securely in a tree stand with a water-type reservoir. Fresh water shall be added daily.
5. Natural cut trees and decorations (such as boughs and wreaths) shall be removed immediately at any indication of dryness such as brittleness, loss of color or falling needles.

The ESD safety committee may be consulted with regard to questions about decorations and is the final authority regarding the use of such decorations. In cases where decorations are deemed to be unsafe according to these regulations or Oregon Fire Safety Regulations, the safety committee shall require the decorations to be removed.

Lane Education Service District

Code: EBAC
Adopted: 1/22/02
Orig. Code(s): EBAC

Safety Committee

A safety committee shall be established to implement Lane ESD's safety program as part of an ongoing effort to help ensure the safety of students, staff and others while on ESD property.

The superintendent [or designee] will coordinate the efforts of the ESD's safety committee efforts and maintain all necessary records.

The superintendent will develop administrative regulations rules as may be necessary to implement this policy and meet the applicable Oregon Occupational Safety and Health Division Administration requirements.

END OF POLICY

Legal Reference(s):

[ORS 654.176](#)
[ORS 654.182](#)

[OAR 437-001-0765](#)
[OAR 581-024-0275\(3\)](#)

Lane Education Service District

Code: EBAC-AR
Adopted: 4/15/94
Revised/Readopted: 4/23/02
Orig. Code(s): EBAC-AR

Safety Committee

ESD Safety Officer

The superintendent shall designate an ESD safety officer. The safety officer shall:

1. Establish an ESD safety committee, ~~advisory to advise the safety officer on implementing, to implement and monitoring~~ ~~monitor the ESD's district safety program;~~;
2. Be responsible for writing and implementing an ESD safety program (The written program shall include reporting procedures and in-service safety training program.);;
3. Coordinate all matters relating to safety and shall make, or cause to be made, periodic inspections of sites;;
4. Maintain a liaison relationship with applicable agencies outside the ESD;;
5. Assist all administrators and department supervisors as necessary in the preparation and implementation of their site safety programs;;
6. Maintain the accident record system; make necessary reports, personally investigate fatal, serious and potentially serious accidents; and check corrective action taken by teachers or other personnel to eliminate causes of accidents;;
7. Establish specific goals for the ESD's safety program and evaluate goals and accomplishments on a regular basis.

~~[ESD Safety Committee]¹~~

~~An safety committee may be established by the safety officer. The primary functions of this committee shall be to assist the safety officer in planning, implementing and evaluating a comprehensive safety program and to assist the site safety committees in the coordination of safety activities. Reasonable efforts shall be made to ensure that committee members are representative of the ESD's various sites where employees work and students and patrons of the ESD may gather. This committee shall be chaired by the safety officer. This committee shall meet at least three times each year. The members of the committee may change but shall include at least the following employees:~~

8. ~~[The safety officer;]~~

¹ [If item 1 above is selected, this section is recommended.]

9. ~~[The technology services program administrator;]~~
10. ~~[The special education program administrator;]~~
11. ~~[The human resources program administrator;]~~
12. ~~[Other program administrator;]~~
13. ~~[A principal;] [and]~~
14. ~~[Representatives from appropriate agencies when there is a need (e.g. workers' compensation carrier, insurance agent of record).]~~

ESD Safety Committee

~~An ESD~~The safety committee shall be established by the superintendent to represent the safety and health concerns of ESD employees and students.

The ~~district~~ safety committee shall be composed of an equal number of employer and employee representatives [at the site]. When agreed upon by employees and the ESD, the number of employees on the committee may be greater than the number of ESD representatives. ~~[The committee will consist of no fewer than 2 members for [an ESD] with 20 or less employees.] [The committee will consist of no fewer than 4 members for [an ESD] districts with more than 20 employees.]~~ , preferably from our 4 major service areas—Technology, Special Education, School Improvement and Business/HR.

A reasonable attempt will be made to ensure that committee members represent major work activities.

Employee representatives shall be volunteers or elected by their peers unless there is a provision in the collective bargaining agreement that addresses the selection of employee representatives. Members of the committee shall serve at least a continuous one-year term. Terms shall be staggered to provide continuity. There shall be a chair elected by the district safety committee.

Employee representatives attending safety committee meetings outside the regularly scheduled workday shall be compensated by the employer at the regular hourly wage.

The ESD safety committee will:

1. Hold regular meetings at least once a month except months when quarterly workplace safety inspections are made. This does not exclude other months from ESD safety committee meetings if more frequent safety inspections are conducted. Quarterly safety committee meetings may be substituted for monthly meetings when the committee's sole area of responsibility involves low hazard work environments such as the ESD district office;
2. Provide written agendas for each meeting which shall set the order of business;
3. Make written records of each meeting which the ESD shall review and maintain for three years for inspection;
4. Post and send copies of meeting records to committee members;

5. Assist in creating a hazard-free work environment by:

- a. Recommending to the ESD how to eliminate hazards in the workplace and promote promoting employee adherence to safe work practices; and
- b. Using lines of communications to promote cooperative attitudes between all persons involved in the operations of the workplace.

Duties of the site safety committee will include:

1. Establishing procedures for minimum quarterly workplace safety inspections of a safety committee inspection team to locate and identify safety and health hazards. The safety inspection team shall include employer and employee representatives. The team shall document the location and identity of the hazards and make recommendations as to how and when the hazards will be corrected;
2. Establishing procedures for investigating all significant safety-related incidents including injury accidents, illnesses and deaths for the purpose of recommending corrective action necessary to prevent similar events from recurring;
3. Evaluating ESD policies which may affect safety and health in the workplace and make recommendations for changes to existing policies or adoption of new policies;
4. Evaluating all the accident and illness prevention programs brought to the committee's attention and making recommendations necessary to make the programs more applicable to the workplace;
5. Establishing a system whereby the safety committee can obtain information that would help in creating a hazard-free work environment, directly from all persons involved in the operations of the workplace. The information obtained shall be reviewed at the next safety committee meeting;
6. Establishing procedures for the review of all safety and health inspection reports made by the committee and making necessary recommendations;
7. Establishing procedures for the review of corrective action taken on the committee's recommendations or determining the reasons why no corrective action was taken;
8. Making all reports, evaluations and recommendations of the safety committee a part of the minutes of the safety committee; and
9. Evaluating employee/supervisor training needs.

Degree of Authority

The ESD safety committee is authorized to make written suggestions to the ESD safety officer, based on its experiences, inspections and input from other employees, students and ESD patrons, as appropriate.

Lane Education Service District

Code: EBB
Adopted: 11/15/11
Readopted: 2/24/15
Orig. Code(s): EBB

Integrated Pest Management

To ensure the health and safety concerns of student, staff and community members, the ESD shall adopt an integrated pest management plan (IPM)[†] which emphasizes the least possible risk to students, staff and community members and shall adopt a list of low-impact pesticides for use with the IPM plan.

The IPM plan is a proactive strategy that:

1. Focuses on the long-term prevention or suppression of pest problems through economically sound measures that:
 - a. Protect the health and safety of students and staff;
 - b. Protect the integrity of ESD buildings and grounds;
 - c. Maintain a productive learning environment; and
 - d. Protect local ecosystem health.
2. Focuses on the prevention of pest problems by working to reduce or eliminate conditions of property construction, operation and maintenance that promote or allow for the establishment, feeding, breeding and proliferation of pest populations or other conditions that are conducive to pests or that create harborage for pests;
3. Incorporates the use of sanitation, structural remediation or habitat manipulation or of mechanical, biological and chemical pest control measures that present a reduced risk or have a low-impact and, for the purpose of mitigating a declared pest emergency, the application of pesticides that are not low-impact pesticides;
4. Includes regular monitoring and inspections to detect pests, pest damage and unsanctioned pesticide usage;
5. Evaluates the need for pest control by identifying acceptable pest population density levels;
6. Monitors and evaluates the effectiveness of pest control measures;
7. Excludes the application of pesticides on a routine schedule for purely preventive purposes, other than applications of pesticides designed to attract or be consumed by pests;
8. Excludes the application of pesticides for purely aesthetic purposes;
9. Includes ESD staff education about sanitation, monitoring, inspection and pest control measures;

[†] See Model Integrated Pest Management Plan for Oregon Schools at http://www.ipmnet.org/tim/IPM_in_Schools/Model_School_IPM_Plan_Main_Page.html

10. Gives preference to the use of nonchemical pest control measures;
11. Allows the use of low-impact pesticides if nonchemical pest control measures are ineffective; and
12. Allows the application of a pesticide that is not a low-impact pesticide only to mitigate a declared pest emergency or if the application is by, or at the direction or order of, a public health official.

The ESD shall designate the [facilities manager] as the Integrated Pest Management Plan Coordinator give them the authority for overall implementation and evaluation of the IPM plan.

Integrated Pest Management Plan Coordinator

The IPM Plan Coordinator shall:

1. Attend not less than six hours of IPM training each year. The training shall include at least a general review of integrated pest management principles and the requirements of IPM as required by Oregon statute;
2. Ensure appropriate prior notices are given and posted warnings have been placed when pesticide applications are scheduled;
3. Oversee pest prevention efforts;
4. Ensuring identification and evaluation of pest situation;
5. Determine the means of appropriately managing pest damage that will cause the least possible hazard to people, property and the environment;
6. Ensure the proper use and application of pesticide applications when non-pesticide controls have been unsuccessful;
7. Evaluate pest management results; and
8. Keep for at least four years following the application date, records of applied pesticides that include:
 - a. A copy of the label;
 - b. A copy of the Data Safety Data Sheet (SDS);
 - c. The brand name and U.S. Environmental Protection Agency (USEPA)² registration number of the product;
 - d. The approximate amount and concentration of pesticide applied;
 - e. The location of where the pesticide was applied;
 - f. The type of application and whether the application was effective;
 - g. The name(s) of the person(s) applying the pesticide;
 - h. The pesticide applicator's license numbers and pesticide trainee or certificate numbers of the person applying the pesticide;
 - i. The dates and times for the placement and removal of warning signs; and
 - j. Copies of all required notices given, including the dates the IPM Coordinator gave the notices.

²U.S. Environmental Protection Agency

9. Respond to inquiries about the IPM plan and refer complainants to Board policy KL - Public Complaints;
10. Conduct outreach to ESD staff about the ESD's IPM plan.

END OF POLICY

Legal Reference(s):

[ORS 634.116](#)

[ORS 634.700 to -634.750](#)

Lane Education Service District

Code: EBBA
Adopted: 4/26/94
Revised/Readopted: 1/22/02
Orig. Code(s): EBBA

First Aid** (Version 1)

(See revised policy EBC for information on First Aid)

In cases of sudden illness or injury to a student or staff member, assistance will be given by staff members trained in first aid. Staff shall notify the parent or designated contact of the emergency as quickly as possible. Further medical attention to students is the responsibility of parents or of someone the parents or guardians designate in case of emergency.

In all cases where the nature of the illness or injury is deemed so serious as to indicate the student's health would be endangered or undue suffering would be caused by delay, immediate emergency and medical/hospital services shall be arranged.

Each teacher and/or program supervisor is charged with providing for the immediate care of ill or injured persons within his/her area of control.

Staff members shall report self-administered first-aid treatment to an immediate supervisor.

Procedures for handling health emergencies will be established and made known to the staff. Each school and district vehicle will be equipped with first-aid supplies and equipment in accordance with Oregon Occupational Safety and Health Administration requirements.

All employees are expected to know where first-aid supplies and equipment are kept in their work areas. Designated employees shall hold current first-aid cards. The names of designated first-aid providers shall be posted in all ESD facilities.

END OF POLICY

Legal Reference(s):

ORS 329.025	ORS 336.211 - 336.214	OAR 581-021-0590
ORS 334.125	OAR 581-021-0017	OAR 581-022-2050
ORS 336.201	OAR 581-021-0031	OAR 581-022-2220
ORS 336.204	OAR 581-021-0587	OAR 581-022-2515

Every Student Succeeds Act of 2015, 20 U.S.C. § 8548 (2018).
Family Education Rights and Privacy Act 20 U.S.C. § 1232g (2018).

Lane Education Service District

Code: EBBA
Adopted:

Student Health Services**

(Version 2)

{Highly recommended policy for ESDs that operate schools. The requirement for ESDs to develop and implement a health services plan comes from OAR 581-022-2220.}

(This policy would replace JHC if present in the ESD's manual.)

Although the ESD's primary responsibility is to educate students, the students' health and general welfare is also an important Board responsibility. The Board believes school programs should be conducted in a manner that protects and enhances student and employee health and is consistent with good health practices. A health services plan shall be developed, implemented, and updated annually. The plan shall describe a health services program for all students at each facility that is owned or leased where students are present for regular programming.

The ESD shall maintain a written prevention-oriented health services plan for all students. The health services plan will¹:

1. Explain available health care space that is appropriately supervised and adequately equipped for providing health care and administering medication or first aid;
2. Refer to available communicable disease prevention and management plan that includes school-level protocols²;
3. Outline an ESD-to-school communication plan³;
4. Provide information about health screenings, including immunizations and TB certificate requirements;
5. Describe how services for all students, including those who are medically complex, medically fragile or nursing dependent, and those who have approved 504 plans, individual education program plans, and individualized health care plans or special health care needs are managed⁴;
6. Integrate school health services with school health education programs and coordinate with health
7. Describe how hearing, vision and dental screenings are managed and/or verified for required students⁵ and social service agencies, public and private;

¹ For exact language and complete requirement see OAR 581-022-2220(1).

² For specific protocol content requirements see OAR 581-022-2220(1)(b).

³ For requirements of this plan see OAR 581-022-2220(1)(c).

⁴ For more information regarding these requirements see ORS 336.201 and 339.869, OARs 581-021-0037, 581-015-2040, 581-015-2045, 851-045-0040 – 0060, and 851-047-0010 – 0030.

⁵ For vision screening or eye examination or dental screening information see ORS 336.211 and 336.213.

8. Include a process to assess and determine a student’s health services needs, including availability of a nurse to assess student nursing needs upon, during, and following enrollment with one or more new medical diagnose(s) impacting a student’s access to education, and implement a student’s individual health plan prior to attending school⁶;
9. Comply with OR-OSHA Bloodborne Pathogens Standards for all persons who are assigned to job tasks which may put them at risk for exposure to body fluids⁷;
10. Refer to adopted policy and procedures for medications in accordance with Oregon law⁸;
11. Include guidelines for the management of students who are medically complex, medically fragile, or nursing dependent as defined by ORS 336.201, including students with life-threatening food allergies and adrenal insufficiency while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in before-school or after-school care programs on school-owned property, and in transit to or from school or school-sponsored activities⁹[; and][.]
12. [List the positions in the ESD which shall be required to obtain and maintain a first-aid/CPR/AED card in accordance with OAR 581-022-2220 (3).]

[Any nurse(s) employed by the ESD and providing services to students and the ESD shall be licensed in Oregon to practice as a registered nurse or nurse practitioner or be a licensed practical nurse (LPN) in alignment with LPN supervision requirements of OAR 851-045-0050 - 0060.

A nurse employed by the ESD shall follow all applicable requirements of Oregon Revised Statutes (ORS) Chapter 678 and Oregon Administrative Rule (OAR) Chapter 851. This includes, but is not limited, delegation in accordance with OAR 851-047, which includes performing a nursing assessment of a student prior to delegation, providing adequate supervision during the delegation, and evaluating the skills, ability and willingness of the delegee.¹⁰

A nurse employed by the ESD will function as an integral member of the instructional staff, serving as a resource person to teachers in securing appropriate information and materials on health-related topics.]

[The ESD provides a menstrual product dispenser with a variety of products in every student bathroom¹¹ which meets the requirements of law.]

END OF POLICY

⁶ For definitions for this policy see ORS 336.201.

⁷ OAR 437-002-0360 lists various health and safety regulations that apply in the employment setting.

⁸ Medication laws can be found in ORS 339.866 – 339.874 and OAR 581-021-0037; relevant Board policy includes JHCD/JHCDA - Medications.

⁹ For guideline requirements see OAR 581-022-2220(1)(k).

¹⁰ For additional delegation requirements see OAR [851-047-0030](#).

¹¹ [“Student bathroom” means a bathroom that is accessible by students, including a gender-neutral bathroom, a bathroom designated for females, and a bathroom designated for males. (OAR 581-021-0587)]

Legal Reference(s):

[ORS 329.025](#)
[ORS 334.125](#)
[ORS 336.201](#)
[ORS 336.204](#)

[ORS 336.211 - 336.214](#)
[OAR 581-021-0017](#)
[OAR 581-021-0031](#)
[OAR 581-021-0587](#)

[OAR 581-021-0590](#)
[OAR 581-022-2050](#)
[OAR 581-022-2220](#)
[OAR 581-022-2515](#)

Every Student Succeeds Act of 2015, 20 U.S.C. § 8548 (2018).
Family Education Rights and Privacy Act 20 U.S.C. § 1232g (2018).

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Lane Education Service District

Code: EBBA-AR
Adopted: 6/15/94
Revised/Readopted: 1/22/02
Orig. Code(s): EBBA-AR

Handling and Disposing of Contaminated Fluids

(Refer to current training requirements.)

Health Division information about the transmission of diseases including AIDS and Hepatitis B focuses on “body fluids” as a possible carrier of organisms that can infect others. The term includes drainage from cuts and scrapes, vomit, urine, feces, respiratory secretions (nasal discharge), saliva, semen and blood. While any contact with the body fluids of another person represents a risk, the level of risk is very low. The risk is increased if the fluid comes in contact with a break in the skin of another individual. Generally, simple, consistent standards and procedures of cleanliness minimize risk.

The following procedures are precautionary measures against the transmission of diseases. Prudent actions are to be employed by all staff and students. These actions should focus primarily on steps that staff members can take to ensure their own well-being.

Those who administer first aid, provide physical care or may otherwise incur occupational exposure to blood or other potentially infectious materials as determined by the district will be specifically protected through Lane ESD’s Exposure Control Plan.

The following procedures are a review for all staff and students of appropriate hygienic and sanitation practices:

1. Standard precautions are to be followed at all times. Standard precautions require the assumption that staff and students approach infection control as if all direct contact with human blood and body fluids is known to be infectious for HIV, HBV and/or other bloodborne pathogens;
2. Whenever possible, students should be directed to care for their own minor bleeding injury. This includes encouraging students to apply their own bandaids. If assistance is required, bandaids may be applied after removal of gloves if caregiver will not come into contact with blood or wound drainage;
3. Food and Drug Administration (FDA) approved gloves are required for all tasks in which an individual may come into contact with blood or other potentially infectious materials. Such tasks include cleaning body fluid spills, emptying trash cans, handling sharps/containers, handling contaminated broken glass, cleaning contaminated equipment and handling contaminated laundry/clothing. This also includes assisting with any minor wound care, treating bloody noses, handling clothes soiled by incontinence, diaper changing and cleaning up vomit;
4. Immediate, complete and effective hand washing with soap and running water of at least 30 seconds duration should follow any first aid or health care given a student or contact with potentially infectious materials;

5. If exposure to blood or other potentially infectious materials occurs through coughing, any first-aid procedure, or through an open sore or break in the skin, thorough washing, preferably with germicidal soap, is necessary;
6. In the event handwashing facilities are not readily available, thorough cleaning using an antiseptic cleanser and clean cloth/paper towels or antiseptic towelettes provided by the ESD as an alternative is necessary. In the event alternatives are used, hands must be washed with soap and running water as soon as feasible;
7. Any surface contaminated with blood or other potentially infectious materials must be cleaned after each use and at the end of the day with soap and water and then rinsed with an Environmental Protection Agency (EPA)¹ approved disinfectant following labeling instructions for use, or a freshly made solution of one part bleach to nine parts water, and allowed to air dry. Other disinfectants as recommended by the Center for Disease Control may be used. These surfaces include equipment, counters, mats (including those used in physical education and athletic events) or changing tables;
8. An EPA-approved disinfectant must be used when cleaning fluids such as blood or vomit from the floor or other such contaminated surfaces;
9. Contaminated laundry such as clothing and towels must be placed and transported in bags and containers in accordance with the ESD's standard recognized precautions. All such items must be laundered in hot or cold water and soap and placed in a dryer;
10. Needles, syringes, broken glassware and other sharp objects found on ESD property must not be picked up by students at any time, nor by staff without appropriate puncture-proof gloves or mechanical device such as a broom, brush and dust pan. Any such items found must be disposed of in closable puncture resistant, leakproof containers that are appropriately labeled or color-coded;
11. All wastebaskets used to dispose of potentially infectious materials must be lined with a plastic bag liner that is changed daily;
12. Gloves and repellent gowns, aprons or jackets are required for tasks in which exposure to blood or other potentially infectious materials can be reasonably anticipated to contaminate street clothing. Type and characteristics of such protective clothing will depend on the task. Such tasks may include diapering/toileting with gross contamination, assisting with wound care, sorting or bagging contaminated laundry/clothing and disposing of regulated waste with gross contamination;
13. Maximum protection with gloves, face and/or eye protection and gowns are required whenever splashes, spray, spatter or droplets of blood or other potentially infectious materials may be generated and eye, nose or mouth contamination can be reasonably anticipated. Such tasks may
14. include feeding a student with a history of spitting or forceful vomiting and assisting with severe injury and wound with spurting blood;
15. If a first-aid situation occurs, students should report to a person in authority, staff should report to a supervisor.

¹ Disinfectants which can be used include Lysol, Purex, Clorox, Tough Act bathroom cleaner, Dow bathroom cleaner, Real Pine liquid cleaner, Pine Sol, Spic and Span, Tackle liquid, Comet and other products with EPA numbers.

Additional Precautions

The following additional precautions should be applied in all school settings. These procedures will help prevent transmission of many infections in addition to HIV and HBV:

1. A sink with soap, hot and cold running water and disposable towels should be available close to the classroom;
2. Sharing of personal toilet articles, such as toothbrushes and razors, should not be permitted;
3. Skin lesions that may ooze blood or serum should be kept covered with a dressing;
4. Exchange of saliva by kissing on the mouth, by sharing items that have been mouthed and by putting fingers in others' mouths should be discouraged.

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Lane Education Service District

Code: EBBAA/GBEBC/JHCCC
Adopted: 10/24/00
Revised/Readopted: 1/22/02
Orig. Code(s): EBBAA/GBEBC/JHCCC

Infection Control - HIV, AIDS, HBV (Version 1)

Lane ESD shall use standard precautions for infection control at all times. Each employee or student is therefore treated as though an HIV, AIDS or HBV¹ infection exists.

The ESD shall develop an Exposure Control Plan that includes infection control procedures for employees and students.

Staff and students, as appropriate, shall receive an annual in-service that includes correct procedures for cleaning up body fluid spills and for personal clean up, appropriate disposal, immunization and personal hygiene, as well as the location and content of first-aid and clean-up kits. Kits shall be readily available to students and staff in ESD programs and facilities and in each ESD vehicle.

In addition to an annual in-service, staff and students on a regular basis will receive HIV, AIDS and HBV information.

This information will emphasize infection, how infection is spread, as well as how it is not spread. Lane ESD will cooperate with the Oregon Department of Education and the Oregon Department of Human Services, Health Services, in delivering HIV, AIDS and HBV education.

END OF POLICY

Legal Reference(s):

[ORS 334.125](#)
[OAR 437-002-0161](#)
[OAR 437-002-0360](#)
[OAR 437-002-1030](#)

[OAR 437-002-1035](#)
[OAR 581-022-2050](#)
[OAR 581-022-2220](#)
[OAR 581-024-0275](#)

[OAR 581-053-0240\(23\)](#)
[OAR 581-053-0250\(1\)](#)
[OAR 581-053-0640\(2\)](#)

Occupational Safety and Health Standards, Bloodborne Pathogens, 29 C.F.R. §§ 1910.1020, 1910.1030.

¹ HIV - Human Immunodeficiency Virus; AIDS - Acquired Immune Deficiency Syndrome; HBV - Hepatitis B Virus

Lane Education Service District

Code:
Adopted:

EBBAA

Infection Control and Bloodborne Pathogens

(Version 2)

{Optional policy. Some of the requirements regarding an Exposure Control Plan and infection control are outlined below.}

The Board recognizes that staff [and students] incur some risk of infection and illness each time they are exposed to blood or other potentially infectious materials. While the risk to staff [and students] of exposure to body fluids due to casual contact with individuals in the school environment is very low, the Board regards any such risk as serious.

Consequently, the Board directs adherence to standard precautions. Standard precautions require that staff [and students] approach infection control as if all direct contact with human blood and body fluids is known to be infectious for bloodborne pathogens¹.

The ESD shall develop an Exposure Control Plan in accordance with the requirements in law².

The Exposure Control Plan shall be reviewed and updated at least annually and when necessary to reflect new or modified tasks and procedures which affect occupational exposure and to reflect new or revised employee positions with occupational exposure. The review and update shall also:

1. Reflect changes in technology that eliminate or reduce exposure to bloodborne pathogens;
2. Annually, document consideration and implementation of appropriate commercially available and effective safer medical devices designed to eliminate or minimize occupational exposure.

The plan shall include training followed by an offer of hepatitis B vaccine and vaccination series for all staff who are required to provide first aid to students and/or for all staff who have occupational exposure as determined by the ESD. Training shall be provided at the time of initial assignment to tasks where occupational exposure may take place and at least annually^[3] thereafter. Staff will receive the annual training⁴ as well as the location and a content review of first-aid and clean-up kits. Kits shall be readily

¹ “Bloodborne pathogens” are pathogenic microorganisms that are present in human blood and can cause disease in humans. These pathogens include, but are not limited to, hepatitis B virus (HBV) and human immunodeficiency virus (HIV). 29 CFR 1910.1030(b)

² See 29 CFR 1910.1030(c)(1) and OAR 437-002-1059 for more information about an Exposure Control Plan. {A template for an exposure control plan may be available from [Oregon OSHA](#).}

³ [Annual training for all employees shall be provided within one year of their previous training. (29 CFR 1910.1030(g)(2)(iv))]

⁴ See 29 CFR 1910.1030(g)(2) for information about training requirements.

available⁵ in close proximity⁶ to all employees in the building and for ESD [or school] vehicles, including each bus⁷.

Personal protective equipment appropriate to job tasks shall be provided by the ESD. A post-exposure evaluation and follow-up shall be made available to any employee sustaining an occupational exposure.

The ESD recognizes that employees who use medical sharps in the performance of their duties (e.g., administering injectable medicines to students, such as epinephrine and glucagon) must, at least annually, be provided with the opportunity to identify, evaluate and select engineering and work practice controls (e.g., sharps disposal containers, self-sheathing needles, safer medical devices, such as sharps with engineered sharps injury protections and needleless systems). The ESD will implement such work practice controls, as appropriate. The ESD will document the solicitation of input from such staff in the plan.

Documentation, including a sharps injury log, will be maintained in accordance with law⁸.

The Exposure Control Plan will be accessible to employees in accordance with law⁹.

~~[Students will be instructed in safe practices to prevent transmission of bloodborne pathogens in accordance with Oregon Health Standards.]~~

END OF POLICY

Legal Reference(s):

- | | | |
|----------------------------------|----------------------------------|--------------------------------------|
| ORS 334.125 | OAR 437-002-1035 | OAR 581-053-0240(23) |
| OAR 437-002-0161 | OAR 581-022-700 | OAR 581-053-0250(1) |
| OAR 437-002-0360 | OAR 581-022-120 | OAR 581-053-0640(2) |
| OAR 437-002-1030 | OAR 581-024-020 | |

Occupational Safety and Health Standards, Bloodborne Pathogens, 29 C.F.R. §§ 1910.1020, 1910.1030.

⁵ OAR 437-002-0161 (2) First-Aid Supplies. (a) The employer shall provide first-aid supplies based upon the intended use and types of injuries that could occur at the place of employment. The first-aid supplies shall be available in close proximity to all employees. Either bulk pack or unit pack supplies are acceptable. (b) “In proximity” is defined as that which is available nearby to ensure prompt treatment in the event of need.

⁶ “In proximity” is defined as that which is available nearby to ensure prompt treatment in the event of need. (OAR 437-002-0161(1)(b))

⁷ Emergency equipment for buses, includes, but is not limited to, body fluid cleanup and first-aid kits. (OAR 581-053-0240 (23); OAR 581-053-0640)

⁸ See OAR 437-002-1030(3) and OAR 437-002-1035.

⁹ See 29 CFR 1910.1020(e) for requirements on providing access.

Lane Education Service District

Code: EBBAB/GBEBAA/JHCCBA
Adopted: 6/28/94
Revised/Readopted: 7/10/01, 8/27/02
Orig. Code(s): EBBAB/GBEBAA/JHCCBA

HBV/Bloodborne Pathogens

(See policy EBBAA)

The Board recognizes that staff/students incur some risk of infection and illness each time they are exposed to blood or other potentially infectious materials. While the risk to staff/students of exposure to body fluids due to casual contact with individuals in the school environment is very low, the Board regards any such risk as serious.

Consequently, the Board directs adherence to standard precautions. Standard precautions require that staff and students approach infection control as if all direct contact with human blood and body fluids is known to be infectious for HIV, HBV and/or other bloodborne pathogens¹.

In order to reduce the risk to staff/students by minimizing or eliminating staff exposure incidents to bloodborne pathogens, the Board directs the superintendent to develop and implement an Exposure Control Plan. The plan shall be reviewed and updated at least annually and whenever necessary to reflect new or modified tasks and procedures which affect occupational exposure and to reflect new or revised employee positions with occupational exposure. The review and update shall also:

1. Reflect changes in technology that eliminate or reduce exposure to bloodborne pathogens;
2. Annually, document consideration and implementation of appropriate commercially available and effective safer medical devices designed to eliminate or minimize occupational exposure.

The plan shall include training followed by an offer of immunization with Hepatitis B vaccine and vaccination series for all staff who are required to provide first aid to students and/or for all staff who have occupational exposure as determined by the ESD. Training shall be provided at the time of initial assignment to tasks where occupational exposure may take place and at least annually thereafter. Personal protective equipment appropriate to job tasks shall be provided by the ESD. A post-exposure evaluation and follow-up shall be made available to any employee sustaining an occupational exposure.

The ESD recognizes that, as required by OAR 437-002-1030, employees who use medical sharps in the performance of their duties (e.g., administering injectable medicines to students, such as epinephrine and glucagon) must, at least annually, be provided with the opportunity to identify, evaluate and select engineering and work practice controls (e.g., sharps disposal containers, self-sheathing needles, safer medical devices, such as sharps with engineered sharps injury protections and needleless systems). The ESD will implement such work practice controls, as appropriate.

Documentation, including a sharps injury log, will be maintained as required by OAR 437-002-1035 and 437-002-1030 (3).

¹ Bloodborne pathogens - pathogenic microorganisms that are present in human blood and can cause disease in humans. These include, but are not limited to, Hepatitis B virus (HBV) and human immunodeficiency virus (HIV).

Legal Reference(s):

D [OAR 437-002-0360](#)
[OAR 437-002](#) -0377

[OAR 437-002](#) -1030
[OAR 437-002](#) -1035

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Lane Education Service District

Code: EBBAB/GBEBAA/JHCCBA-AR
Adopted: 9/11/96
Revised/Readopted: 7/10/01
Orig. Code(s): EBBAB/GBEBAA/JHCCBA-AR

Bloodborne Pathogen Exposure Control Plan

(Plans do not generally rise to the AR level; are usually internal documents; and published when required. Current?)

For Compliance OSHA Standard - OAR 437-002-0360 to -0375

Definitions

The following definitions apply to this document and the OR-OSHA administrative rules on bloodborne pathogens:

“Blood”: Human blood, human blood components and products made from human blood.

“Bloodborne Pathogens”: Pathogenic micro-organisms that are present in human blood and can cause disease in humans. These pathogens include, but are not limited to, Hepatitis B Virus (HBV) and Human Immunodeficiency Virus (HIV).

“Clinical Laboratory”: A workplace where diagnostic or other screening procedures are performed on blood or other potentially infectious materials.

“Contaminated”: The presence or the reasonably anticipated presence of blood or other potentially infectious materials on an item or surface.

“Contaminated Laundry”: Laundry which has been soiled with blood or other potentially infectious materials or may contain sharps.

“Contaminated Sharps”: Any contaminated object that can penetrate the skin including, but not limited to, needles, scalpels, broken glass, broken capillary tubes and exposed ends of dental wires.

“Decontamination”: The use of physical or chemical means to remove, inactivate or destroy bloodborne pathogens on a surface or item to the point where they are no longer capable of transmitting infectious particles and the surface or item is rendered safe for handling, use or disposal.

“Engineering Controls”: Controls (e.g., sharps disposal containers, self-sheathing needles) that isolate or remove the bloodborne pathogens hazard from the workplace.

“Exposure Incident”: A specific eye, mouth or other mucous membrane, nonintact skin or parenteral contact with blood or other potentially infectious materials that results from the performance of any employee’s duties.

“Handwashing Facilities”: A facility providing an adequate supply of running potable water, soap and single use towels or hot air drying machines.

“Licensed Health-Care Professional”: A person whose legally permitted scope of practice allows him/her to independently perform the activities required by OAR 437-002-0360 (f) (Hepatitis B Vaccination of Post-Exposure Evaluation and Follow up).

“HBV”: Hepatitis B Virus.

“HIV”: Human Immunodeficiency Virus.

“Hazard”: An actual or potential exposure to risk.

“Occupational Exposure”: Reasonably anticipated skin, eye, mucous membrane or parenteral contact with blood or other potentially infectious materials that may result from the performance of an employee’s duties.

Other Potentially Infectious Materials:

- Semen;
- Vaginal secretions;
- Cerebrospinal fluid;
- Synovial fluid;
- Pleural fluid;
- Pericardial fluid;
- Peritoneal fluid;
- Amniotic fluid;
- Saliva in dental procedures;
- Any body fluid that is visibly contaminated with blood;
- All body fluids where it is difficult to differentiate between body fluids;
- Any unfixed tissue or organ (other than intact skin) from a human (living or dead).

“Parenteral”: Piercing mucous membranes or the skin barrier through such events as needle sticks, human bites, cuts and abrasions.

“Personal Protective Equipment”: Specialized clothing or equipment worn by an employee for protection against a hazard. General work clothes (e.g., uniforms, pants, shirts or blouses) not intended to function as protection against a hazard are not considered to be personal protective equipment (PPE).

“Regulated Waste”: Liquid or semi-liquid blood or other potentially infectious materials: contaminated items that would release blood or other potentially infectious materials in a liquid or semi-liquid state if compressed; items that are caked with dried blood or other potentially infectious materials and are capable of releasing these materials during handling; contaminated sharps; and pathological and microbiological wastes containing blood or other potentially infectious materials.

“Source Individual”: Any individual, living or dead, whose blood or other potentially infectious materials may be a source of occupational exposure to the employee. Examples include, but are not limited to:

- Hospital and clinic patients;
- Clients in institutions for the developmentally disabled;
- Trauma victims;

- Clients of drug and alcohol treatment facilities;
- Residents of hospices and nursing homes;
- Human remains;
- Individuals who donate or sell blood or blood components.

D “Sterilize”: The use of a physical or chemical procedure to destroy all microbial life including highly resistant bacterial endospores.

“Standard Precautions”: An approach to infection control. All human blood and certain human fluids are treated as if known to be infectious for HIV, HBV and other bloodborne pathogens.

E “Work Practice Controls”: Controls that reduce the likelihood of exposure by altering the manner in which a task is performed (e.g., prohibiting recapping of needles by a two-handed technique).

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**BLOODBORNE PATHOGEN EXPOSURE CONTROL PLAN
LANE EDUCATION SERVICE DISTRICT (LANE ESD)**

In accordance with OR-OSHA Bloodborne Pathogens Standard, OAR 437-002-0360 to -0375 the following Exposure Control Plan has been developed:

1. Purpose

The purpose of this Exposure Control Plan is to:

- a. Eliminate or minimize employee occupational exposure to blood or certain other body fluids;
- b. Comply with the OR-OSHA Bloodborne Pathogens Standard, OAR 437-002-0360 to -0375.

2. Exposure Determination

OR-OSHA requires employers to perform an exposure determination concerning which employees may incur occupational exposure to blood or other potentially infectious materials or high risk occupations. Lane ESD does not have any occupations that are in a high-risk category.

However, when a contact has been made with infectious materials, fluids or persons with Hepatitis B, Lane ESD will make available, at no cost to the employee, any necessary, confidential medical evaluation and follow-up as required by OSHA. Also, Lane ESD will provide training in prevention of exposure to infectious situations and how to dispose of contaminated waste.

In addition, OR-OSHA requires a listing of job classifications in which some employees may have occupational exposure. Not all the employees in these categories would be expected to incur exposure to blood or other potentially infectious materials. Job classifications and tasks or procedures that would cause these employees to have occupational exposure are listed as follows:

JOB CLASSIFICATION	TASK/PROCEDURE
Directors and Supervisors	Program Dependent
Custodian(s) working at ESD	General facility cleaning
Teachers/Educational and Behavioral Assistants working directly with students	Changing menstrual pads Tooth brushing Emesis clean-up Cleaning nose/mouth secretions General health care Blood glucose monitoring Delegated nursing task
Persons who may provide first aid to students/staff	First aid for injuries

3. Implementation Schedule and Methodology

OR-OSHA requires that this plan include a schedule and method of implementation for the various requirements of the standard. The following complies with this requirement.

4. Compliance Method

Standard precautions will be observed at Lane ESD in order to prevent contact with blood or other potentially infectious materials.

Engineering controls and work practices will be utilized to eliminate or minimize exposure to employees at Lane ESD. Injured parties will be encouraged to care for themselves when feasible. Where occupational exposure remains after institution of these controls, personal protective equipment will also be utilized. At Lane ESD, the following engineering controls and work practices will be utilized:

- a. Leak-proof containers lined with a red plastic bag for disposal of bloody waste;
- b. Sharps containers for needle, blade and lancet disposal;
- c. Students will cleanse their own bloody wounds when possible, using gauze, soap and water;
- d. Pressure will be applied using gauze and gloved hands when the student needs assistance.

The above controls will be examined and maintained on a regular schedule. The schedule for reviewing the effectiveness of the controls is as follows:

- a. On a daily basis as needed, the custodian will remove the red plastic bag, clean and decontaminate the container as necessary. A new red plastic bag will be put in place;
- b. A custodian will take filled sharps containers to Lane County Health Department for proper disposal;
- c. Hand washing facilities will be made available to employees who incur exposure to blood or other potentially infectious materials. OR-OSHA requires that these facilities be readily accessible after incurring exposure. (If hand washing facilities are not feasible, Lane ESD will provide antiseptic towelettes or an antiseptic cleanser and paper towels. The hands are to be washed with soap and running water as soon as possible. Playground aides will be provided with packets which will contain latex gloves, paper towels, antiseptic towelettes, gauze pads and a plastic sack for waste materials.);
- d. Supervisors will ensure that after the removal of gloves, employees will wash hands and any other potentially contaminated skin area immediately or as soon as feasible with soap and water;
- e. Supervisors will ensure that employees who incur exposure to their skin or mucous membranes will wash or flush exposed areas with water as soon as feasible following the contact;
- f. The use of disposable gloves is necessary for care givers who give first aid when body fluids are present (cleaning cuts and scrapes, helping with a bloody nose, examining secreting rashes). When applicable, those care givers who handle diapers or student's clothing soiled by feces or urine must take similar precautions and wear protective clothing (a vinyl apron, for example) if contamination is anticipated;
- g. If unanticipated contact with body fluids occurs, hands and all other affected skin areas must be washed thoroughly with soap and running water as soon as possible. Effective hand washing requires the use of soap and vigorous washing under a stream of running water for at least 30 seconds. Use paper towels to dry hands well and to turn off hand-operated faucet;
- h. Any articles used to clean body fluid spills must be handled with gloved hands and disposed of in a plastic bag or a receptacle labeled with a biohazard sign. If an absorbent agent is used, sweepings must be disposed of in a similar manner. Brooms and dust pans must be cleaned with a disinfectant;

- i. Freshly mixed household bleach in a 1:10 solution (one part bleach to nine parts cool water) is recommended for sanitizing. Bleach solution should be made fresh every 24 hours in order to be effective. A tightly sealed bottle marked with a line for one part bleach and another line for nine parts water can be kept handy. The fresh solution can be stored out of direct light. The bottle must be clearly labeled;
- j. Wash contaminated surfaces with soap and water to remove all visible contamination. The surface to be sanitized must be visibly clean and free of all soap residue. Do not mix bleach with soap or detergent, as any organic material will inactivate the active ingredient. The contaminated surface must be in contact with bleach solution for at least 10 minutes.

Needles

- 5. Contaminated needles or other contaminated sharps will not be bent, recapped, removed, sheared or purposely broken. OR-OSHA allows an exception to this if the procedure would require that the contaminated needle be recapped or removed and no alternative is feasible and the action is required by the medical procedure. If such action is required, then the recapping or removal of the needle must be done by a mechanical device or a one-handed technique. Empty immunization vials will be disposed of in the sharps container.

6. Work Area Restriction

Employees are not to eat, drink, apply cosmetics or lip balm, smoke or handle contact lenses in the health room. Food and beverages are not to be kept in refrigerators, freezers, shelves, cabinets or on counter tops or bench tops where blood or other potentially infectious materials are present. Hands must be washed before and after assisting with first aid, before and after meals and after toileting.

All procedures will be conducted in a manner which will minimize splashing, spraying, splattering and generation of droplets of blood or other potentially infectious materials. Methods employed to accomplish this goal are:

- a. The custodian will be called when body fluids need to be cleaned up;
- b. Employees involved in activities which might cause splattering of infectious materials will wear gloves and/or vinyl aprons, as necessary.

7. Contaminated Equipment

The custodian is responsible for ensuring that equipment which has become contaminated with blood or other potentially infectious materials will be examined and decontaminated as necessary as soon as possible.

Personal Protective Equipment (PPE)

- a. General: Supervisors are responsible for ensuring that latex gloves are provided without cost to employees. The nature of anticipated exposure to body fluids at a school requires latex gloves (and when applicable, a vinyl apron) to be the only personal protective equipment that is generally needed. If the employee's clothing should become contaminated with body fluids, the employee will be given time to change clothing. Soiled clothing will be placed in a plastic bag and sent home with the owner and handled in accordance with standard precautions.

A CPR mask with a one-way valve will be provided at each instructional site.

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- b. PPE Use (Personal Protective Equipment): Supervisors will ensure that the employee uses appropriate PPE unless it is shown that the employee temporarily and briefly declined to use PPE when under rare and extraordinary circumstances it was the employee's professional judgment that in the specific instance its use would have prevented the delivery of health care or posed an increased hazard to the safety of the worker or co-worker. When the employee makes this judgment, the circumstances will be investigated and documented in order to determine whether changes can be instituted to prevent such occurrences in the future.
 - c. PPE Accessibility: Supervisors will ensure that appropriate PPE in the appropriate sizes is readily accessible at the work site or is issued without cost to employees. Hypoallergenic gloves, glove liners, powderless gloves or other similar alternatives will be readily accessible to those employees who are allergic to the gloves normally provided.
 - d. PPE Cleaning, Laundering and Disposal: All personal protective equipment will be cleaned, laundered and/or disposed of by the employer at no cost to the employees. All repairs and replacements of PPE will be made by Lane ESD at no cost to the employees. All garments which are penetrated by blood will be removed immediately or as soon as feasible. All PPE will be removed prior to leaving the work area.

When PPE is removed, it will be placed in an appropriately designated area or container for storage, washing, decontamination or disposal. Reusable items, such as CPR masks and vinyl aprons will be sanitized using a freshly made 1:10 (one part bleach, nine parts cool water) bleach solution.

- e. Gloves: Gloves will be worn when it is reasonably anticipated that employees will have hand contact with blood, other potentially infectious materials, nonintact skin or mucous membranes; when handling or touching contaminated items or surfaces.

Disposable latex gloves are not to be washed or decontaminated for re-use and are to be replaced as soon as practical if they are torn, punctured or when their ability to function as a barrier is compromised. Utility gloves may be decontaminated for re-use provided that the integrity of the glove is not compromised. Utility gloves will be discarded if they are cracked, peeling, torn, punctured or exhibit other signs of deterioration or when their ability to function as a barrier is compromised. Disposable latex gloves will be removed by grasping the cuff and pulling them wrong side out. Soiled gloves will be placed in the plastic bag with other contaminated waste material, double bagged and disposed of according to state and local regulations.

- f. Eye and Face Protection: A CPR mask with a one-way valve is to be used in the event of cardiac or respiratory arrest. Ordinary school activities do not require other masks, goggles or face shields to prevent splashes, splatter or droplets of blood.
- g. Additional Protection: The need for additional protective clothing is not anticipated in the normal course of school activities. (Vinyl aprons are to be made available for staff when appropriate.)

9. Housekeeping

All bins, pails, cans and similar receptacles will be inspected and decontaminated on a regularly scheduled basis once a month by the custodian and cleaned and decontaminated immediately or as soon as feasible upon visible contamination.

Decontamination will be accomplished by utilizing the following materials:

- a. Blood or body fluid spills: A Quaternary disinfectant or a freshly made 1:10 bleach solution (one part bleach and nine parts cool water);
- b. Counters and sink: A Quaternary disinfectant or bleach solution;
- c. Broken glassware: Not to be picked up directly with the hands.

10. Regulated Waste Disposal

Gauze and other first-aid products used to cleanse bloody wounds in the health room will be placed in a plastic bag-lined waste can. The bag will be securely tied and disposed of daily. The state of Oregon does not require special disposal practices for this type of waste.

11. Laundry Procedures

Laundry contaminated with blood or other potentially infectious materials generated in school or at a worksite will be handled using standard precautions. Such laundry will be placed in a plastic bag and sent home with the owner, if possible, to be handled according to standard precautions.

12. Hepatitis B Vaccine and Exposure Evaluation and Follow-Up

- a. General: Lane ESD will make available the Hepatitis B vaccine and post-exposure follow-up to all employees who have occupational exposure as determined by the district and/or to all employees who have had an exposure incident.

Lane ESD will ensure that all medical evaluations and procedures including the Hepatitis B vaccine and vaccination series and post-exposure follow-up including prophylaxis, are:

- (1) Made available at no cost to the employee;
- (2) Made available to the employee at a reasonable time and place;
- (3) Performed by or under the supervision of a licensed physician or by or under the supervision of another licensed health care professional;
- (4) Provided according to the recommendations of the U.S. Public Health Service.

All laboratory tests will be conducted by an accredited laboratory at no cost to the employee.

- b. Hepatitis B Vaccination: The human resources administrator is in charge of the Hepatitis B vaccination program, if any are needed.

Hepatitis B vaccination will be made available after the employee has received the training in occupational exposure and within 10 working days of initial assignment to all employees who have occupational exposure, unless the employee has previously received the complete Hepatitis B vaccination series, antibody testing has revealed that the employee is immune or the vaccine is contraindicated for medical reasons.

Participation in a pre-screening program will not be a prerequisite for receiving Hepatitis B vaccination.

If the employee initially declines Hepatitis B vaccination, but at a later date, while still covered under the standard, decides to accept the vaccination, the vaccination will be made available.

D All employees who decline the Hepatitis B vaccination offered will sign the OR-OSHA required declination statement indicating their refusal. (See Hepatitis B Declination Statement form, page 11-20). If the employee refuses to sign the declination statement, the supervisor will make a notation on the form and sign as a witness to the employee's refusal.

If a routine booster dose of Hepatitis B vaccine is recommended by the U.S. Public Health Service at a future date, such booster doses will be made available.

- c. **E** Post-Exposure Evaluation and Follow-Up: All exposure incidents will be reported, investigated and documented. When the employee incurs an exposure incident, it will be reported to the immediate supervisor and an incident report will be completed immediately, conjointly with a health professional.

Following a report of an exposure incident, the exposed employee will immediately receive a confidential medical evaluation and follow-up, including at least the following elements:

- (1) Documentation of the route of exposure and the circumstances under which the exposure incident occurred;
- (2) Identification and documentation of the source individual, unless it can be established that identification is not feasible or prohibited by state or local law;
- (3) The source individual's blood will be tested as soon as possible and after consent is obtained in order to determine HBV and HIV infectivity. Laboratory tests requested by Lane ESD will be paid for by the ESD. If consent is not obtained, the human resources manager will establish that legally required consent cannot be obtained. When the source individual's consent is not required by law, the source individual's blood, if available, will be tested and the results documented;
- (4) When the source individual is already known to be infected with HBV or HIV, status need not be repeated;
- (5) Results of the source individual's testing will be made available to the exposed employee and the employee will be informed of applicable laws and regulations concerning disclosure of the identity and infectious status of the source individual;
- (6) The exposed employee's blood will be collected and tested for HBV and HIV status as soon as possible after exposure and consent is obtained. The employee will have the option of having the blood sample preserved for up to 90 days to allow the employee time to consider the ramifications of testing. Any employee who wants to participate in the medical evaluation program must agree to have blood drawn.

All employees who incur an exposure incident will be offered post-exposure evaluation testing and treatment in accordance with OR-OSHA standard. All post-exposure follow-up will be performed by a physician under contract with Lane ESD.

- d. **F** Information Provided to the Health Care Professional: The human resources administrator will ensure that the physician responsible for the employee's Hepatitis B (HBV) vaccination is provided with the following:

- (1) A copy of OAR 437-002-0360 with confidentiality being emphasized;

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- (2) A written description of the exposed employee's duties as they related to the exposure incident;
 - (3) Written documentation of the route of exposure and circumstances under which exposure occurred;
 - (4) Results of the source individual's blood testing, if available;
 - (5) All medical records relevant to the appropriate treatment of the employee including HBV vaccination status, the staff member's current emergency information record and the most recent medical occurrences.

e. Health Care Professional's Written Opinion: The human resources administrator will obtain and provide the employee with a copy of the evaluating health care professional's written opinion within 15 days of the completion of the evaluation. The information in the report will be confidential. The health care professional's written opinion for post-exposure follow-up will be limited to the following information:

- (1) A statement that the employee has been informed of the results of the evaluation;
- (2) A statement that the employee has been told about any medical conditions resulting from exposure to blood or other potentially infectious materials which require further evaluation or treatment;
- (3) Whether the Hepatitis B vaccination is recommended;
- (4) Whether the employee has received the Hepatitis B vaccination.

NOTE: All other findings remain confidential and will not be included in the written report.

13. Labels and Signs

Lane ESD will not ordinarily produce regulated waste products. Plastic or biohazard labeled waste containers that are leakproof, with lids, will be used to collect absorbent gauze pads, disposable gloves and contaminated paper. These plastic bags will be removed when filled, tied in a knot at the top and disposed of.

14. Information and Training

In accordance with applicable regulations, the human resources administrator will ensure that training is provided at the time of initial assignment to tasks potentially involving occupational exposure. Review will be provided annually for all returning employees. Additional training will be provided to employees when there are any changes of tasks or procedures affecting the employee's occupational exposure. Training and review will be tailored to the employee's education and language level and will be offered during regular work hours at no cost to the employee. The training will be interactive and will cover the following:

- a. Where a copy of the OR-OSHA standard is available and an explanation of its contents;
- b. A discussion of the epidemiology and symptoms of bloodborne diseases;
- c. An explanation of the modes of transmission of bloodborne pathogens;
- d. An explanation of Lane ESD Bloodborne Pathogen Exposure Control Plan and a method for obtaining a copy;
- e. An explanation of the appropriate methods for recognizing tasks and other activities that may involve exposure to blood and other potentially infectious materials;

- f. An explanation of the use and limitations of methods to reduce exposure, for example: engineering controls, work practices and personal protective equipment (PPE);
- g. Information of the types, use, location, removal, handling, decontamination and disposal of PPE's;
- h. An explanation of the rationale for selection of PPE's;
- i. Information regarding the Hepatitis B vaccination including efficacy, safety, method of administration, benefits and that it will be offered free of charge;
- j. Information on the appropriate actions to take and persons to contact in an emergency involving blood or other potentially infectious materials;
- k. An explanation of the procedures to follow if an exposure incident occurs including the method of reporting and medical follow-up;
- l. Information regarding the post-exposure evaluation and follow-up required after an employee exposure incident;
- m. An explanation of the signs, labels and color-coding systems.

The person conducting the training will be knowledgeable in the subject matter.

15. Record Keeping

- a. Medical Records: Medical records will be maintained by the human resources department in accordance with OAR 437-002-0015 in a locked file cabinet in the human resources office area. These records will be kept confidential and must be maintained for at least the duration of employment plus 30 years. (Long-term storage will be in the human resources office.) The records will include the following:
 - (1) The name and social security number of the employee;
 - (2) A copy of the employee's HBV vaccination status including the dates of vaccination and any medical records related to the employee's ability to receive vaccination;
 - (3) A copy of all results of examinations, medical testing and follow-up procedures;
 - (4) A copy of the health care professional's written opinion - whether Hepatitis B vaccination is indicated and if the employee has received such vaccination;
 - (5) A copy of the information provided to the health care professional including a description of the employee's duties as they related to the exposure incident and documentation of the routes of exposure and circumstances of the exposure.
- b. Training Records: The human resources administrator is responsible for maintaining the training records. These records will be kept in the human resources office. Training records will be maintained for three years from the date of the training. The records will document the following:
 - (1) The dates of the training session;
 - (2) An outline describing the material presented;
 - (3) The names and qualifications of persons conducting the training;
 - (4) The names and job titles of all persons attending the training session.
- c. Availability: All employee records will be made available to the employee in accordance with OAR 437-002-0015. All employee records will be made available to the Assistant Secretary of Labor for the Occupational Safety and Health Administration and the Director of the National Institute for Occupational Safety and Health upon request.

- d. Transfer of Records: If this facility is closed or there is no successor employer to receive and retain the records for the prescribed period, the director of the NIOSH will be contacted for final disposition.

16. Evaluation and Review

The safety committee is responsible for reviewing this program, its effectiveness and for updating this program as needed on an annual basis.

17. Dates

All provisions required by this standard will be implemented by June 1, 1993.

18. Consents and Waivers

If employees, source individuals or parents of source individuals refuse to sign any form requested, a Lane ESD employee will make a notation on the form that the individual refused to sign. The employee will then date and sign the form as a witness to this refusal.

19. Outside Contractors

Outside contractors will be responsible for meeting OR-OSHA requirements for their employees.

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**LANE EDUCATION SERVICE DISTRICT
HEPATITIS B DECLINATION STATEMENT**

The following statement of declination of Hepatitis B vaccination must be signed by an employee who chooses not to accept the vaccine. The statement can only be signed by the employee following appropriate training regarding Hepatitis B, Hepatitis B vaccination, the efficacy, safety, method of administration and benefits of vaccination, and that the vaccine and vaccination are provided free of charge to the employee. The statement is not a waiver; employees can request and receive the Hepatitis B vaccination at a later date if they remain occupationally at risk for Hepatitis B.

DECLINATION STATEMENT

I understand that due to my occupational exposure to blood or other potentially infectious materials, I may be at risk of acquiring Hepatitis B Virus (HBV) infection. I have been given the opportunity to be vaccinated with Hepatitis B vaccine, at no charge to me; however, I decline Hepatitis B vaccination at this time. I understand that by declining the vaccine I continue to be at risk of acquiring Hepatitis B, a serious disease. If, in the future, I continue to have occupational exposure to blood or other potentially infectious materials and I want to be vaccinated with Hepatitis B vaccine, I can receive the vaccination series at no charge to me.

Print Employee's Name

Employee's Social Security Number

Employee's Signature

Date

**LANE EDUCATION SERVICE DISTRICT
BLOOD OR OTHER BODY FLUID POST-EXPOSURE REPORT**

Policy Statement: Any exposure incident (a specific mouth, eye or other mucous membrane, nonintact skin or parenteral contact with blood or other potentially infectious material) that results from the performance of an employee's duties will be reported immediately to the human resources administrator.

Date: _____ Time: _____ Reported by: _____

Description of incident (include route(s) and circumstances of exposure): _____

Person: _____ Title: _____ Date: _____

EXPOSURE INFORMATION	
Source Individual	Exposed Employee
Name:	Name:
School:	School:
DOB:	Classroom/Site:
Grade:	Home Address:
SS#:	Home Address:
Parent/Guardian:	Date Referred to Physician:
Home Phone:	Work Phone:
Physician Name:	Documents Sent to Physician (check below)
Physician Phone:	Bloodborne Pathogen Exposure Report <input type="checkbox"/>
Physician Address:	Hepatitis B Vaccination Consent/Waiver <input type="checkbox"/>
	Source Individual Consent/History <input type="checkbox"/>
	OR-OSHA Regulation <input type="checkbox"/>
Hepatitis B Status, if known:	
Parent Notified (date/time):	
Consent Form Sent:	
Consent Form Obtained:	
Consent Refused:	
Employee Notified of Refusal:	
Follow-Up	Follow-Up
Physician's Statement:	Physician's Statement

Date Returned and Attached:

Date Returned and Attached:

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**LANE EDUCATION SERVICE DISTRICT
HEPATITIS B VACCINATION RECORD**

D Employee's Name: _____ School/Facility: _____

Job Classification: _____ Social Security #: _____

<u>Series</u>	<u>Date</u>	<u>Administered By</u>	<u>Lot #</u>
#1	E	_____	_____
#2		_____	_____
#3		_____	_____
#4		_____	_____
#5		_____	_____

ANTIBODY/LAB TEST RESULTS

Indicate any Hepatitis B lab results and dates done:

HBsAg _____ **L** _____ Date: _____

HBsAg _____ Date: _____

HBsAg _____ Date: _____

HBsAg _____ **E** _____ Date: _____

HBsAg _____ Date: _____

HBsAg _____ Date: _____

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**LANE EDUCATION SERVICE DISTRICT
SOURCE INDIVIDUAL HISTORY AND CONSENT**

I hereby authorize an exchange of information to occur between the agencies/physicians listed below. I am aware that I, or my child, have been identified as a source individual where an employee may have been exposed to blood or other potentially infectious body fluids.

1. Lane Education Service District
1200 Highway 99 North
PO Box 2680
Eugene OR 97402

2. Employee's Medical Practitioner:

Name: _____ Phone: _____

Address: _____

3. Student's Medical Practitioner:

Name: _____ Phone: _____

Address: _____

I authorize a release of any or all information contained in the record of:

Name: _____ Phone: _____

School: _____

Other Names Used: _____

Signature of Parent or Guardian

Date

Dr. _____: This student or employee is a source individual of a bloodborne pathogen or other potentially infectious body fluid exposure incident. The above-named employee, parent or guardian has been notified of OAR 437-002-0360 to -0375, Exposure guideline on bloodborne pathogens. Please return the following medical information.

HBsAg _____ Date: _____ HIV: _____ Date: _____

Results of:

M.D. Signature

Date

**LANE EDUCATION SERVICE DISTRICT
SOURCE INDIVIDUAL REFUSAL FOR BLOOD TESTING**

D

Lane Education Service District
1200 Highway 99 North
PO Box 2680
Eugene OR 97402

Source Individual Name: _____ DOB: _____

Parent/Guardian: _____ Phone: _____

Address: _____

Date Employee Exposed: _____ Date Parent/Guardian Notified: _____

School Health Official Signature Date

Please read, sign below and return to the human resources administrator at the address listed above.

I have been informed by _____ that I/my child have/has been identified as being a source individual in an employee exposure incident to blood or other potentially infectious body fluids.

I am aware of the risks to the employee and I have declined blood testing to be performed for Hepatitis B and HIV. I have been informed that if I had consented to this testing, this information would be released to the employee's medical provider and to Lane ESD's human resources administrator.

Signature

Date

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PHYSICIAN'S STATEMENT AND WRITTEN OPINION

Lane Education Service District

1200 Highway 99 North

PO Box 2680

Eugene OR 97402

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Please complete the following information and return to the human resources administrator at the address listed above. OR-OSHA requires that the employer will obtain and provide the employee with a copy of this written opinion within 15 days of completion of this medical evaluation. Please note that the following records are accompanied with this form to assist in your medical evaluation:

- OR-OSHA regulation regarding post-exposure protocol;
- Bloodborne pathogen exposure report;
- Hepatitis B vaccination history/waiver;
- Source individual's medical information and release of confidential information.

Hepatitis B Prophylaxis

1. Is Hepatitis B vaccination indicated? YES NO
2. If so, was vaccination given? YES NO DATE GIVEN: _____
If yes, projected date for next dose: _____
3. Are there any medical contraindications? YES NO

4. Was HBIG given? YES NO
If yes, please explain: _____
If yes, date received: _____

Antibody Testing

1. Date blood drawn: _____
2. Baseline Hepatitis B result: _____
3. Baseline HIV completed: _____

(If employee does not give consent initially for HIV serologic testing, the sample must be preserved for at least 90 days. The employee may later elect to have the baseline done during this 90-day period.)

Post-Exposure Counseling and Follow-Up

Further recommendations: _____

I certify that the employee has been informed of the results of this medical evaluation, has been advised about any medical conditions resulting from exposure to blood or other potentially infectious materials and has been advised about any further evaluation or treatment.

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Physician's Signature

Date

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LANE EDUCATION SERVICE DISTRICT
ACCIDENTAL BODY FLUID EXPOSURE LOG

Facility Name: _____

Facility Address: _____

School Health Official: _____

Name of Exposed: _____ Student Staff DOB: _____

Source Individual, if known: _____

Reported By: _____ Title: _____ Date: _____ Time: _____

Description of Incident: _____

Was consultation with health care provider sought: YES NO

If so, name of health care provider: _____

Recommendation of health care provider: _____

Facility Address: _____

School Health Official: _____

Name of Exposed: _____ Student Staff DOB: _____

Source Individual, if known: _____

Reported By: _____ Title: _____ Date: _____ Time: _____

Description of Incident: _____

Was consultation with health care provider sought: YES NO

If so, name of health care provider: _____
Recommendation of health care provider: _____

Lane Education Service District

Code: EBBB
Adopted: 10/24/00
Revised/Readopted: 1/22/02; 8/27/02; 2/25/14;
12/06/17
Orig. Code(s): EBBB

Injury/ or Illness Reports

All injuries or illnesses¹, sustained by the employee while in the actual performance of the duty of the employee, occurring on ESD premises, in ESD vehicles, at a ESD-sponsored activity or involving staff members who may be elsewhere on ESD business will be reported immediately to a supervisor. [Staff members will report self-administered first-aid² treatment to an immediate supervisor.] All accidents involving employees, students, visiting public or ESD property will be reported immediately to a supervisor.

A written report will be submitted within 24 hours to the ESD's safety officer. Reports will cover property damage as well as personal injury.

In the event of a work-related³ illness or injury to an employee resulting in in-patient overnight hospitalization, loss of an eye, amputation or avulsion⁴ for medical treatment⁵ other than first aid, the ESD safety officer shall report the incident to the Oregon Occupational Safety and Health Division (OR-OSHA). This report will be made within 24 hours after notification to the ESD of an illness or injury. Fatalities or catastrophes⁶ shall be reported⁷ to OSHA within eight hours.

ALL injuries or illnesses sustained by an employee, while in the actual performance of the duty of the employee, or by a student or visiting public and accidents involving {school or} ESD property, employees,

¹ The Oregon Occupational Safety and Health Division provides: "Injury or illness" means an abnormal condition or disorder. Injuries include cases such as, but not limited to, a cut, fracture, sprain, or amputation. Illnesses include both acute and chronic illnesses, such as, but not limited to, skin disease, respiratory disorder, or poisoning (record injuries and illnesses only if they are new, work-related cases that meet one or more of the recording criteria). (OAR 437-001-0015(39))

² For employees, "first aid" means any one-time treatment and subsequent observation of minor scratches, cuts, burns, splinters, or similar injuries that do not ordinarily require medical care. Such one-time treatment and subsequent observation is considered first aid even though it is provided by a physician or registered professional personnel. (OAR 437-001-0015(34))

³ An injury or illness is work-related if an event or exposure in the work environment either caused or contributed to the resulting condition or significantly aggravated a preexisting condition. injury or illness. (OAR 437-001-0700(6))

⁴ Amputations and avulsions are only required to be reported if they result in bone loss. (OAR 437-001-0704(4))

⁵ Medical treatment includes managing or caring for a patient for the purpose of combatting disease or disorder. The following are not considered medical treatment: visits to a doctor or health care professional solely for observation or counseling; diagnostic procedures including administering prescription medications used solely for diagnostic purposes; and any procedure that can be labeled first aid.

⁶ "Catastrophe A catastrophe" is an accident in which two or more employees are fatally injured, or three or more employees are admitted to a hospital or an equivalent medical facility. (OAR 437-001-0015(11))

⁷ Reporting must be done in person or by telephone. (OAR 437-001-0704(3))

students or visiting public will be promptly investigated. As a result of the investigation any corrective measures needed will be acted upon.

The ESD safety officer will maintain records and reports on serious injuries/illnesses, including accidents involving ESD property or employees, students or visiting publics, and periodic statistical reports on the number and types of injuries/illnesses occurring in the ESD, as well as on the measures being taken to prevent such injuries/illnesses in the future.

The records will include monthly reporting information and an analysis of the data and trends will be conducted at least annually. The ESD safety officer will maintain records on injuries, illnesses, and accidents involving ESD property, employees, students or visiting publics. These records will include prevention measures taken, reporting information, periodic statistical reports on the number and types of injuries, illnesses and accidents occurring in the ESD, and monthly and annual analyses of accident data. Such reports will be submitted to the superintendent for review annually.

END OF POLICY

Legal Reference(s):

[ORS 339.309](#)

[OAR 437-001-0015](#)

[OAR 437-001-0700](#)

[OAR 437-001-0704](#)

[OAR 437-001-0760](#)

[OAR 437-002-0360](#)

[OAR 437-002-0377](#)

[OAR 581-024-0275](#)

Lane Education Service District

Code: EBBC
Adopted: 6/28/94
Revised/Readopted: 1/22/02
Orig. Code(s): EBBC

Life-Sustaining Emergency Care

The Board recognizes its obligation under state and federal law to make educational services available to students of legal age, ~~including to provide educational services to students with disabilities, to provide reasonable accommodations that permit students with disabilities access to services and to provide a free public education to students with identified disabilities including special education and supportive services.~~

Reasonable accommodation includes ~~the~~ provision of life-sustaining emergency care.

A refusal to provide life-sustaining emergency care to a student in need of such care would be a denial of ~~supportive services and reasonable accommodations necessary for the student to benefit from his/her education and would constitute a discontinuation of further educational services, based solely on the student's disability.~~ No employee of Lane ESD shall comply with any directive from parents or others, written or verbal, that life-sustaining emergency care be withheld from a student in need of such care while under the control and supervision of Lane ESD staff.

For purposes of this policy, "life-sustaining emergency care" means any procedure or intervention applied by appropriately trained ESD staff that may prevent a student from dying who, without such procedure or intervention, faces a risk of imminent death. Examples of life-sustaining emergency care may include: efforts to stop bleeding, unblocking airways, mouth-to-mouth resuscitation and cardiopulmonary resuscitation (CPR).

In a life-threatening situation, ~~ESD~~ district staff will dial 9-1-1 for paramedic assistance and provide life-sustaining emergency care to any student requiring it in order to sustain life until relieved by paramedics or other appropriate medical personnel.

The ESD shall consider requests for alternative forms of life-sustaining emergency care but those requests must be supported by written medical substantiation by the student's physician. Determinations shall be made on such requests by a team of Lane ESD staff who are knowledgeable about the student. The team may seek such additional outside information, including an independent medical opinion when necessary, for a decision. Any determination made on such a request must be based on the likelihood that the chosen form of life-sustaining emergency care shall maintain the student's life until an ambulance arrives or the student is otherwise transported to the care of medical personnel.

END OF POLICY

Legal Reference(s):

[ORS 30.800](#)

[OAR 437-002-0161](#)

[OAR 581-024-0275](#)



Lane Education Service District

Code: EBC
Adopted: 12/07/17
Orig. Code(s): EBC



Emergency Plan (Version 1)

The superintendent will develop and maintain a plan specifying procedures to be used in emergencies such as but limited to: **E**ly conduct, unlawful assembly, disturbances at the ESD, disturbances at ESD schools, natural disasters, injury accidents, fire, chemical spills, hazardous materials, exposure to contagious diseases, firearms and other illegal acts that threaten the health and safety of staff and students. The ESD emergency **E** will be coordinated with appropriate police and fire services, ambulance services and area hospitals.

Copies of the Emergency Plan will be available at ESD operated facilities and other strategic locations throughout the ESD.

The Board may use Oregon Revised Statute (ORS) 192.660(2)(k) to conduct an executive session to consider matters related to safety **L** or a plan that responds to safety threats made toward the ESD or its school(s).

The ESD will provide an adequate internal communication system in ESD-operated facilities to transmit emergency information to staff and students in a rapid and clear manner. Periodic training will be provided to staff and students.

Appropriate first-aid supplies and at least one staff member with a current first-aid/CPR card shall be available in all ESD-operated facilities. **E**

END OF POLICY

Legal Reference(s):

[ORS 30.800](#)
[ORS 192.660\(2\)\(k\)](#)
[ORS 334.125](#)
[ORS 433.260](#)
[ORS 433.441](#)
[OAR 437-002-0042](#)

Every Student Succeeds Act, 20 U.S.C. § 7928 (2018).

[OAR 437-002-0120 - 0139](#)
[OAR 437-002-0161](#)
[OAR 437-002-0360](#)
[OAR 437-002-0377](#)
[OAR 581-022-2030\(3\)\(c\)](#)
[OAR 581-022-2220](#)

Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

[OAR 581-024-0275](#)
[OAR 581-053-0003\(40\)](#)
[OAR 581-053-0220\(3\)\(e\)\(B\)\(iii\)](#)
[OAR 581-053-0320\(5\)\(b\)](#)
[OAR 581-053-0420\(2\)\(f\)\(B\)](#)

Lane Education Service District

Code: EBC
Adopted:

Emergency Procedures Plan and First Aid^[**]

(Version 2)

{Highly recommended policy. This policy informs about a requirement for an emergency procedures plan (OAR 581-024-0275) and other minimum standards for providing emergency care (OAR 581-022-2220(3).}

The ESD will maintain a comprehensive safety program for all employees and students. This program will include a plan for responding to emergency situations. ~~[The ESD emergency plan will be coordinated with appropriate police and fire services, ambulance services and area hospitals.]~~

Copies of the Emergency Plan will be available in the ESD office [, ESD school(s)] and other strategic locations throughout the ESD. ~~[Parents or guardians will be informed of the ESD’s plan.]~~

The ESD shall provide instruction to staff [and students] in the emergency plan and safety program. ^{¹}

In each ESD facility, procedures for handling health emergencies will be established and made known to staff. Each ESD facility and ESD vehicle will be equipped with appropriate first-aid supplies and equipment. All employees are expected to know where first-aid supplies and equipment are kept in their work areas.

At least one staff member with a current first-aid/CPR[/AED] card [for every 60 students enrolled] shall be available in all ESD-operated facilities. ~~[Emergency planning will include the presence of at least one staff member with a current first-aid/CPR/AED card for every 60 students for school-sponsored activities where students are present.]~~

END OF POLICY

Legal Reference(s):

[ORS 30.800](#)
[ORS 192.660\(2\)\(k\)](#)
[ORS 334.125](#)
[ORS 433.260](#)
[ORS 433.441](#)
[OAR 437-002-0042](#)

[OAR 437-002-0120 - 0139](#)
[OAR 437-002-0161](#)
[OAR 437-002-0360](#)
[OAR 437-002-0377](#)
[OAR 581-022-2030\(3\)\(c\)](#)
[OAR 581-022-2220](#)

[OAR 581-024-0275](#)
[OAR 581-053-0003\(40\)](#)
[OAR 581-053-0220\(3\)\(e\)\(B\)\(iii\)](#)
[OAR 581-053-0320\(5\)\(b\)](#)
[OAR 581-053-0420\(2\)\(f\)\(B\)](#)

Every Student Succeeds Act, 20 U.S.C. § 7928 (2018).

Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

¹ {OAR 581-024-0275 requires the ESD to provide training in the “emergency plan.”}

Lane Education Service District

Code: EBCB
Adopted: 7/12/94
Revised/Readopted: 1/22/02
Orig. Code(s): EBCB

Emergency Procedure Drills and Instruction

{Highly recommended policy. This policy includes information about required instruction and drills on emergency procedures in schools¹. See ORS 336.071}

Emergency drills shall be conducted in accordance with the provisions of Oregon Revised Statutes and the applicable Oregon Fire Code.

Students served in ESD facilities shall participate in emergency procedures. The emergency procedures shall include drills and instruction on fires, earthquakes, ~~tsunami procedures~~ and safety threats.

Instruction on emergency procedures shall be conducted for at least 30 minutes each school month. The first emergency evacuation drill shall be conducted within 10 days of the beginning of classes.

~~An emergency drill or rapid dismissal for fire, earthquakes or other emergencies will be held at least once each month during the school year for all Lane ESD program students.~~

~~Special drill activities may be planned to ensure orderly movement and placement of students in the safest available building area.~~

Fire Emergencies

Drills and instruction on fire emergencies shall include routes and methods of exiting the ESD facilities.

Earthquake ~~and Tsunami~~ Emergencies

~~At least two drills on earthquakes shall be conducted each year.~~ ~~At least three drills on earthquakes that include tsunami drills shall be conducted each year.~~

Drills and instruction for earthquake emergencies shall include the earthquake emergency response procedure of “drop, cover and hold on” during the earthquake. When based on the evaluation of specific engineering and structural issues related to a building, the ESD may include additional response procedures for earthquake emergencies.

¹ {ORS 336.071 (6) As used in this section, “school” means any: (a) Kindergarten through grade 12 public or private school; or (b) Educational institution having an average daily attendance of 50 or more students.}

² {Required if school is in a designated tsunami hazard zone.}

³ {This is required action for a school not in a tsunami hazard zone.}

⁴ {This is required action for a school in a tsunami hazard zone.}

~~[[⁵]Drills and instruction on tsunami emergencies shall include immediate evacuation after an earthquake, when appropriate, or after a tsunami warning to protect students against inundation by tsunamis.]~~

Safety Threats

At least two drills on safety threats shall be conducted each year. Drills and instruction on safety threats shall include procedures related to lockdown, lockout, shelter in place and evacuation and other appropriate actions to take when there is a threat to safety, and will include the school's communication strategy following a safety threat action (See Board policy EBCA - Safety Threats**).

[The ESD may provide additional instruction relating to other disasters such as flooding, drought, excessive snowfall or wildfires.^{6}]

Local units of government and state agencies associated with emergency procedures training and planning shall review the emergency procedures[, and assist the school with the instruction and the conducting of drills for students in these emergency procedures].

Lane ESD staff working in component districts shall comply with local district policies and procedures.

END OF POLICY

Legal Reference(s):

[ORS 336.071](#)

[ORS 339.324](#)

[ORS 476.030](#)

[OAR 581-024-0275](#)

[OREGON STATE FIRE MARSHAL](#), OREGON FIRE CODE.

⁵ {This is a required action for a school in a tsunami hazard zone.}

⁶ {The Oregon Department of Education has resources available at <https://www.oregon.gov/ode/schools-and-districts/grants/pages/threat-and-hazard-resources.aspx>.}

Lane Education Service District

Code: EBCD
Adopted: 1/22/02
Orig. Code(s): EBCD

Emergency Closures

(Does this still reflect current practice? Does this align with practices in GCBCC/GDBCC and AR?)

ESD Offices

The superintendent shall determine when conditions warrant delayed opening, early closure or full-day closure of the ESD offices.

ESD Sites Located in Component District Facilities

When component districts have delayed opening, early closure or full-day closure, ESD staff assigned to those sites will be governed by such action regardless of the decision made concerning the ESD district office.

Compensation

(Is this practice the same? Should it be here? Or is it already in an agreement?)

Regular employees will be paid for the full day in the event of emergency action resulting in late opening, early closure or full-day closure.

Extended closures due to emergencies may result in a modification of the work calendar.

~~[Other closure terms which may be applicable are outlined in Board policy GCBCC/GDBCC – Work Schedules and Closures and any accompanying administrative regulation.]~~

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

[OAR 437-002-0377](#)

[OAR 581-053-0004](#)

[OAR 437-002-0360](#)

[OAR 581-024-0240](#)

[OAR 581-024-0275](#)

Lane Education Service District

Code: EC
Adopted: 4/26/94
Readopted: 1/22/02
Orig. Code(s): EC

Management of Buildings and Grounds

(Consider this is covered by policy EB and others on safety.)

The Board recognizes that the fixed assets of Lane ESD represent a significant investment of this community and their maintenance is of prime concern to the Board.

The Board directs the conduct of a continuous program of inspection and maintenance for the upkeep of buildings, grounds and equipment to reasonably protect the health and safety of all persons using them. Wherever possible and feasible, maintenance shall be preventive.

The superintendent shall develop and implement a maintenance program which shall include:

1. A regular program of facilities repair and conditioning;
2. A critical spare parts inventory;

END OF POLICY

Legal Reference(s):

ORS 332.172	OAR 437-002-0144	OAR 437-002-0377
OAR 437-001-0760	OAR 437-002-0145	OAR 437-002-0390
OAR 437-002-0020 to -0081	OAR 437-002-0180 to -0182	OAR 437-002-0391
OAR 437-002-0140	OAR 437-002-0360	OAR 581-022-1610
	OAR 437-002-0368	

Fazzolari v. Portland School District No. 1J, 78 Or. App. 608 (1986); aff'd, 303 Or. 1 (1987).

Toxic Substances Control Act, 15 U.S.C. Sections 2601-2629, as amended by the Asbestos Hazard Emergency Response Act of 1986, 15 U.S.C. Sections 2641-2656.

T

E

Lane Education Service District

Code: ECAAA
Adopted: 3/16/04
Revised/Readopted: 8/23/11
Orig. Code(s): ECAAA

Employee Identification Badge System

To help ensure the safety protection of staff and students, and to reduce the possibilities of theft, vandalism and loss of ESD district property, all ESD district employees shall be issued and will display and wear identification badges as required.

The district's photo identification badge system will serve as an instant identification system for security purposes and will assist staff, parents, students and other visitors to ESD school locations in identifying ESD school employees. Employees will display the identification card at all times when working with students and as required when carrying out work assignments in the performance of their duties district and community locations.

A badge system, with appropriate designation but without a photograph, shall be used for visitors to ESD facilities schools during regular school hours and for substitutes and/or temporary employees.

The superintendent is directed to develop administrative regulations as necessary to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS 192.447](#)

[ORS 334.125\(5\), \(7\)](#)

Lane Education Service District

Code: ECAAA-AR
Adopted: 3/16/04
Readopted: 8/23/11
Revised/Reviewed:
Orig. Code(s): ECAAA-AR

Employee Identification Badge System

Staff members issued an identification badge will be subject to the following requirements:

1. Identification badges are the property of the ESD district for use by ESD district employees. Any employee who duplicates or lends their/his/her identification badge will be subject to disciplinary action;
 2. All identification badges are to be displayed/worn in plain sight when the employee is engaged working with students and as required when carrying out work assignments in the performance of ESD duties/district and community locations;
 3. A report of a lost or stolen badge must be made to the appropriate administrator immediately;
 4. An identification ~~card~~ badge lost, stolen or damaged due to circumstances beyond the employee's control will be replaced by the ESD district at no cost to the employee. Other replacement costs will be charged to the employee;
 5. Identification badge requests must be made directly to the ~~[program administrator]~~ human ~~[personnel]~~human resources resources office];
 6. The appropriate administrator will be responsible for collecting staff identification badges at the end of the assigned work shift in the event of employee resignation, nonrenewal, nonextension or termination;
 7. The ESD district will not disclose the identification badge or card of an employee without the written consent of the employee if:
 - a. The badge or card contains the photograph of the employee;
 - b. The badge or card was prepared solely for internal use by the ESD district to identify employees.
- The ESD district will not disclose a duplicate of the photograph used on the badge or card.
8. The ESD may use the badge photograph for internal purposes. Any other use of the photograph requires written employee consent.

Lane Education Service District

Code: ECAB
Adopted: 1/22/02
Readopted: 6/15/04;11/15/11
Orig. Code(s): ECAB

Vandalism, Malicious Mischief, or Theft**

Students and patrons/citizens are urged to cooperate in reporting any incidents of vandalism, malicious mischief or theft and the name or names of the person or persons believed to be responsible.

Each ESD employee will report to a program supervisor or administrator incidents of vandalism, malicious mischief or theft and the name of the person or persons responsible, if known.

A program supervisor or administrator will submit a report of any incidents of vandalism, malicious mischief, theft or damage to the superintendent. The superintendent will report to the Board regarding major reports of vandalism, malicious mischief, theft or damage to any ESD district property.

~~[The ESD may offer a reward to an individual(s) who provides information that results in the apprehension of a person(s) guilty of vandalism, malicious mischief, theft or other criminal acts against the ESD district. The amount of reward shall be determined by the superintendent on a case-by-case basis within any guidelines set by the Board.]~~

The superintendent is authorized to sign a criminal complaint and to press charges against those committing acts of vandalism or malicious mischief against ESD property or theft of or against ESD property. ~~Because incidents of willful or malicious abuse, destruction, defacing and theft of district property are clearly contrary to the best interests of the district and injurious to the rights and welfare of the entire community, it~~ It is the policy of the Board to seek all legal remedies against persons found to have committed such acts. Full restitution for the damage will be sought from such persons, or, in the case of minors, from their parents. Until such fees or restitutions are paid, certain restrictions and/or penalties may be imposed. Records requested by another educational agency to determine a student's appropriate placement may not be withheld.

A student/Students who willfully destroys/destroy ESD property through vandalism, malicious mischief, theft or arson, who commit/commit larceny or who creates/create a hazard to the safety of other people on ESD district property will be disciplined in accordance with state law and the Board's policies/policy on student discipline¹ and referred to law enforcement/authorities.

Any staff member who willfully fails to report such an vandalism, malicious mischief or theft, or willfully destroys ESD property through vandalism, malicious mischief, theft or arson, who commits larceny or who creates a hazard to the safety of other people on ESD property will be disciplined, up to and including dismissal and referred to law enforcement.

~~[The ESD is not liable or responsible for personal property brought onto ESD property.]~~

¹ Use of suspension or expulsion as discipline for a student in violation of this policy is limited to criteria found in Oregon

Lane Education Service District

Revised Statute (ORS) 339.250.

END OF POLICY

Legal Reference(s):

[ORS 30.765](#)
[ORS 164.345](#)
[ORS 164.365](#)

[ORS 334.125\(7\)](#)
[ORS 326.575](#)
[ORS 339.240](#)

[ORS 339.250](#)
[ORS 339.270](#)
[ORS 419C.680](#)

Lane Education Service District

Code: ECAC
Adopted:

Video Surveillance

The Board authorizes the use of video cameras on ESD property to ensure the health, welfare and safety of all staff, students and visitors to ESD property, and to safeguard district facilities and equipment. Video cameras may be used in locations as deemed appropriate by the superintendent.

The ESD shall notify staff and students through student/parent and staff handbooks that video surveillance may occur on ESD property.

Students or staff in violation of Board policies, administrative regulations, building rules or law shall be subject to appropriate disciplinary action. Others may be referred to law enforcement.

A video recording may become a part of a student's educational record or a staff member's personnel record. The ESD shall comply with all applicable state and federal laws related to record maintenance and retention.

END OF POLICY

Legal Reference(s):

[ORS 30.864](#)
[ORS 192.420 to -192.505](#)
[ORS 326.565](#)
[ORS 326.575](#)

[ORS 334.125](#)
[ORS 336.187](#)
[ORS 342.850](#)

[OAR 166-400-0010 to -0065](#)
[OAR 581-021-0210 to -0430](#)
[OAR 581-022-2260](#)

Individuals with Disabilities Education Act (IDEA), 20 U.S.C. §§ 1400-1412.
Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2003) Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2017).

Lane Education Service District

Code: ECACB
Adopted: 2/05/19
Revised/Readopted: 4/07/20
Orig. Code(s): ECACB

Unmanned Aircraft System (UAS) a.k.a. Drone

Any employee, volunteer, or representative of the ESD operating an unmanned aircraft system (UAS) shall do so in accordance with this policy, all applicable Federal Aviation Administration (FAA) and Oregon Department of Aviation (ODA) regulations and local laws.

A small unmanned aircraft, as defined by law, may be operated by the ESD. A small unmanned aircraft must weigh less than 55 pounds, including the weight of anything attached to or carried by the aircraft and must be registered through the FAA and ODA. The ESD will register as a user of such with ODA.

Publicly supported kindergarten through grade 12 school programs and publicly-supported entities that support K-12 schools or after school K-12 programs are exempt from the requirement to pay the ODA registration fee.

The ESD recognizes the academic value of student operation of a UAS as one component of curricula pertaining to principles of flight, aerodynamics and airplane design and construction, which can also serve as an academic tool in other areas such as television, film production or the arts in general.

Prior to operating a UAS, the ESD will review all airspace, certification, registration, and other requirements. When operating in the National Airspace System (NAS), the supervisor (instructor/teacher) of the educational UAS shall hold a current pilot certification described in 14 C.F.R. Part 107 or have a Certificate of Authorization as described in 49 U.S.C. § 44801, so any student(s) can fly under their direct supervision, and to be in compliance with current FAA¹ regulations. ESD staff will not operate more than one UAS at the same time.

ESD employees shall work with administrators to ensure that proper insurance, registration as required by FAA and ODA, reporting to FAA, and authorization from ESD administration are in place prior to use as part of the ESD's curriculum.

~~A UAS shall be operated in accordance with the policies of the Oregon School Activities Association (OSAA)² at OSAA-sanctioned events.~~

A student in violation of this policy may be subject to disciplinary action, up to and including suspension and/or expulsion.

A staff member in violation of this policy may be subject to disciplinary action, up to and including dismissal.

All data gathered by the ESD as part of a UAS operation will belong to the ESD. The data gathering by the ESD will follow appropriate state and federal laws. Retention of such data will follow state and federal laws.

¹ https://www.faa.gov/uas/educational_users/

² <http://www.osaa.org/governance/handbooks>

The superintendent shall develop procedures³ for the implementation of this policy. The ESD shall post a copy of this policy, associated procedures, and a copy of Oregon Revised Statute (ORS) 192.345 on the ESD's website.

The ESD will report accidents involving a UAS to FAA no later than 10 calendar days after the accident when it involves:

1. Serious injury to any person or any loss of consciousness; or
2. Damage to any property, other than the small UAS, unless the cost of repair (including materials and labor) does not exceed \$500, or the fair market value of the property does not exceed \$500 in the event of total loss.

Third Party Use

Third party use of a UAS on ESD property or at ESD-sponsored events or activities on ESD property for any purpose is prohibited, unless granted permission from the superintendent or designee.

If permission is granted by the superintendent or designee, the third party operating a UAS will comply with all FAA and ODA registration and use regulations and shall provide the following to the ESD:

1. Proof of insurance that meets the liability limits established by the ESD;
2. Proof of UAS registration and authorization (including a certificate identified in 14 C.F.R. Part 107 or a Certificate of Authorization described in 49 U.S.C. § 44801) issued by FAA, and proof of user registration with ODA when required⁴; and
3. A signed agreement holding the ESD harmless from any claims of harm to individuals or damage to property.

END OF POLICY

Legal Reference(s):

[ORS 164.885](#)
[ORS 174.109](#)
[ORS 192.345](#)

[ORS 334.125\(7\)](#)
[ORS 837.300 - 837.390](#)
[ORS 837.995](#)

[OAR 738-080-0015 - 080-0045](#)
Senate Bill 581 (2019)

Federal Aviation Administration Reauthorization Act of 2018, 49 U.S.C. §§ 44801-44810 (2012).

Small Unmanned Aircraft Systems, 14 C.F.R. Part 107 (2018).

Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

OREGON SCHOOL ACTIVITIES ASSOCIATION HANDBOOK.

³ Procedures must include: the length of time data will be retained by the district; specifications for third party storage of data, including handling, security and access to the data by the third party; a policy on disclosure of data through intergovernmental agreements.

⁴ A public body, as defined in ORS 174.109, operating an unmanned aircraft system must register as a user with ODA. (ORS 837.360)

Lane Education Service District

Code: ECD
Adopted: 3/29/94
Revised/Readopted: 1/22/02
Orig. Code(s): ECD

Traffic and Parking Controls

The superintendent shall authorize parking areas and post notices on Lane ESD property designated for staff, student, visitor parking and parking for persons with disabilities and other classifications of parking areas as may be necessary.

Any vehicle not parked in authorized areas may be cited and/or towed away and stored. ~~Such action will be considered by the ESD only after a reasonable effort has been made to contact the vehicle owner or operator.~~ All charges for towing and storing will be the responsibility of the owner or operator of the vehicle.

Any person failing to abide by the ESD's parking regulations may be further prohibited from bringing any vehicle on ESD-controlled property.

Program administrators will establish rules as necessary for the use and control of staff parking areas. Such rules will be made available to the staff.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)
[ORS 334.175](#)

[ORS 334.185](#)
[ORS 447.233](#)

[OAR 581-024-0240](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2012); 29 C.F.R. Part 1630 (2016); 28 C.F.R. Part 35 (2016).
Americans with Disabilities Act Amendments Act of 2008.

Lane Education Service District

Code: ECE
Adopted: 3/29/94
Revised/Readopted: 1/22/02
Orig. Code(s): ECE

Buildings and Grounds Records and Reports

(Does ECAB already cover this?)

Losses incurred through fire, theft, accident or vandalism will be reported to the business office as soon as they are discovered. The business office may report such losses to an appropriate agency as well as to the superintendent.

END OF POLICY

Legal Reference(s):

[ORS 332.172](#)

Toxic Substances Control Act, 15 U.S.C. Sections 2601-2629, as amended by the Asbestos Hazard Emergency Response Act of 1986, 15 U.S.C. Sections 2641-2656.

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Lane Education Service District

Code: EDC/KGF
Adopted: 8/29/00
Readopted: 1/22/02
Orig. Code(s): EDC/KGF

Authorized Use of ESD Equipment and Materials

ESD materials and equipment will be used only for ESD purposes by ESD personnel on ESD properties.

Exceptions to this policy must be approved by the {superintendent}{and/or the Board,} and shall be consistent with Oregon Revised Statute (ORS) Chapter 244 and the Oregon Government Ethics Commission guidance.

~~It shall be the policy of the Board that Lane Education Service District equipment and properties shall not be used outside the ESD Center or other ESD program sites except in accordance with this policy and the administrative rules developed to implement this policy.~~

~~The ESD property in the nature of desks, lockers, cabinets, documents, computers and computer related equipment or records pre-assigned to staff for the convenience of staff shall be used by staff subject to the ESD's right to inspection. The ESD may at any time, with or without notice, inspect any or all of such property. Any item contained in ESD's property that is not appropriately in the staff member's possession, or is an illegal or dangerous item, or an item prohibited by ESD policy or rules, may be seized by the ESD upon prompt notification thereafter to the employee. No staff member shall have any right of privacy with respect to use of any ESD property or information stored therein.~~

The ESD's equipment and properties are intended for use by employees of the ESD in carrying out the responsibilities of their assignments. In certain instances (for example, equipment and properties which are included as part of media services), such use will extend to the loaning of such ESD equipment or properties to authorized staff members of the ESD's component school districts for their use.

When fulfillment of an employee's responsibilities can be assisted by the use of certain items of ESD equipment or property at a location away from the normal workplace, such item(s) may be checked out for such off-premises use. The employee will be expected to use prescribed check-out procedures and to be responsible for safeguarding the equipment or properties during such period of use.

ESD equipment and properties which are deemed appropriate for off-premises use by ESD staff or by authorized component district employees may be rented to other entities if a current contractual agreement exists between the ESD and the entity in question. The rental fee shall cover all costs associated with making the item available.

ESD property pre-assigned to staff for the convenience of staff shall be used by staff subject to the ESD's right to inspection. The ESD may at any time, with or without notice, inspect any or all of such property. Any item contained in ESD's property that is not appropriately in the staff member's possession, or is an illegal or dangerous item, or an item prohibited by ESD policy or rules, may be seized by the ESD upon prompt notification thereafter to the employee. No staff member shall have any right of privacy with respect to use of any ESD property or information stored therein.

In all cases of public use, equipment shall not be used for private financial gain. An equipment use form must be submitted and approved, and all conditions outlined on the attached ESD equipment list must be adhered to. [There are no equipment use fees.] In the event of excessive damage, a fee will be determined according to repair or replacement costs. Transportation of borrowed equipment will be the user's responsibility.

END OF POLICY

Legal Reference(s):

[ORS Chapter 244](#)
[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)
[OAR 584-020-0040](#)

OR. ETHICS COMM'N, OR. GOV'T ETHICS LAW, A GUIDE FOR PUBLIC OFFICIALS (2008).

Lane Education Service District

Code: EDDA
Adopted: 4/28/09
Orig. Code(s): EDDA

Sustainability

The ESD recognizes sustainability as an important principle that supports developing an ethic of sustainability in its practices. The ESD defines “sustainability” as “meeting the educational, environmental, social and economic needs of present generations without compromising the ability of future generations to meet their own needs.” Sustainability is managed through efforts in balancing the interdependent areas of education, environment, society and economy to contribute to a healthy future for our students, staff and the ESD.

Sustainability may be demonstrated through:

1. Leadership in sustainable management – striving to balance educational, economic, social and environmental issues in our daily decision-making;
2. Leadership in student achievement – incorporating environmental, social and economic sustainability concepts in our education of students;
3. Leadership in fostering student health and well-being – providing a physical environment that promotes the health, productivity and safety of students and staff;
4. Continual improvement – seeking new, expanded and improved ways to create a sustainable and restorative future.

~~To effectively achieve these commitments, the ESD may implement a Sustainability Management System (SMS)¹ that extends sustainability to ESD activities.~~

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

¹For more information contact www.sustainableschools.org.

Lane Education Service District

Code: EEA
Adopted:

Student Transportation Services *

(For ESDs that operate a school.)

The ESD may provide transportation for students enrolled in ESD programs when requested by the district. The extent of services shall be determined by contract.

Field trips involving transportation of students must be approved by the [program supervisor] and [superintendent]. Aides or assistants that ride a school bus shall receive training on emergency procedures and their role in the safe transportation of all students on the bus.

END OF POLICY

Legal Reference(s):

[ORS 327.006](#)
[ORS 334.125\(7\)](#)
[ORS 343.155 - 343.246](#)
[ORS 343.533](#)
[ORS 811.210](#)
[ORS 811.215](#)
[ORS 815.055](#)
[ORS 815.080](#)

[ORS 820.100 - 820.190](#)
[OAR 581-021-0050 - 0075](#)
[OAR 581-022-2345](#)
[OAR 581-024-0240](#)
[OAR 581-024-0275](#)
[OAR 581-053-0002](#)
[OAR 581-053-0003](#)

[OAR 581-053-0004](#)
[OAR 581-053-0010](#)
[OAR 581-053-0031](#)
[OAR 581-053-0040](#)
[OAR 581-053-0210](#)
[OAR 735-102-0010](#)

Every Student Succeeds Act of 2015 , 20 U.S.C. §§ 6315, 7912 (2012).

Lane Education Service District

Code: EEACD
Adopted: 4/27/10
Orig. Code(s): EEACD

Use of District ~~ESD~~ Activity Vehicles for Student Transportation

Transportation of students in Lane ESD programs is, as a general rule, the responsibility of the student's resident district.

The Board may provide for the use of vehicles, commonly designated as Types 10, 20 or 21 pupil transportation vehicles, which do not meet the requirements of a "school bus" for the purpose of transporting students, licensed, classified or other supervisory personnel to and from curricular and extracurricular activities sponsored by the ~~ESD~~ district. The use of ESD activity vehicles will be limited to circumstances where public transportation or component district transportation options are not available.

The vehicle shall be insured for bodily injury, property damage, uninsured motorist coverage and personal injury protection. The ~~executive director of business~~ services will recommend amounts to adequately protect the ~~ESD~~ district against loss.

The ~~ESD~~ district will meet or exceed minimum driver requirements and procedures as set forth in ~~Oregon~~ Administrative Rules, Section 53. ~~ORs 581-053-0545, 581-053-0550 and 581-053-0555~~. The ~~district~~ ESD shall meet child safety system requirements and minimum standards and specifications as set forth in state law ~~ORS 811.210, 815.055 and 815.080 and OAR 735-102-0010~~.

END OF POLICY

Legal Reference(s):

[ORS 811.210](#)
[ORS 815.055](#)
[ORS 815.080](#)
[ORS 820.110](#)
[ORS 820.190](#)

[OAR 437-002-0220 to -0227](#)
[OAR 581-053-0003](#)
[OAR 581-053-0010](#)

[OAR 581-053-0220](#)
[OAR 581-053-0310](#)
[OAR 581-053-0320](#)
[OAR 581-053-0330](#)
[OAR 581-053-0340](#)
[OAR 581-053-0410](#)
[OAR 581-053-0420](#)
[OAR 581-053-0430](#)
[OAR 581-053-0440](#)

[OAR 581-053-0511](#)
[OAR 581-053-0521](#)
[OAR 581-053-0531](#)
[OAR 581-053-0540](#)
[OAR 581-053-0610](#)
[OAR 581-053-0620](#)
[OAR 581-053-0630](#)
[OAR 735-102-0010](#)

Lane Education Service District

Code: EEAE
Adopted: 6/28/94
Revised/Readopted: 1/22/02
Orig. Code(s): EEAE

Student Transportation in Private Vehicles

School transportation services will be provided by component districts to Lane ESD students for transportation to and from school. Either component school district transportation services or appropriate public transportation may be used for school-sponsored activities that are extensions of classroom learning experiences.

~~Neither Private vehicles nor Lane ESD~~ vehicles shall not be used to transport students on field trips or other ESD-related activities.

END OF POLICY

Legal Reference(s):

[ORS 801.455](#)
[ORS 811.210](#)

[ORS 811.215](#)
[ORS 815.055](#)

[ORS 815.080](#)
[OAR 735-102-0010](#)

Lane Education Service District

Code: EEBA
Adopted: 4/26/94
Readopted: 1/22/02; 5/22/12
Orig. Code(s): EEBA

District Vehicles/~~Seat Belts~~

All Lane ESD personnel using ESD-owned vehicles (drivers and passengers) must use seat belts as required by Oregon law. Failure to do so is grounds for discipline up to and including dismissal.

The driver of any ESD-owned vehicle is responsible for determining that the number of passengers does not exceed the number of seat belts. The vehicles shall not be driven until the driver and all passengers are buckled up and properly secured.

END OF POLICY

Legal Reference(s):

[ORS 334.125](#)
[ORS 811.210](#)
[ORS 815.055](#)

[ORS 815.080](#)

[OAR 735-102-0010](#)

[OAR 437-002-0223](#)

Lane Education Service District

Code: EEBB
Adopted: 2/27/96
Readopted: 1/22/02
Orig. Code(s): EEBB

Use of Private Vehicles for ~~District~~ ESD Business

Employees who are expected to use a personal vehicle~~automobile~~ when traveling for business purposes will be reimbursed in an amount that meets requirements as set forth in accordance with mileage reimbursement rates established by the Board and/or collective bargaining agreement as applicable ESD fiscal procedures.

Employees using private vehicles for ESD business are subject to ESD policies as long as the vehicle~~car~~ is being used for ESD business.

Employees using private vehicles for ESD business must carry vehicle~~automobile~~ liability insurance in accordance with Oregon Revised Statutes~~statutes~~. The employee's personal vehicle~~automobile~~ insurance is the primary carrier in case of accident or damage. The ESD's insurance serves as the secondary carrier for liability purposes only.

~~The superintendent will develop rules for staff use of private vehicles for ESD business that will safeguard the ESD and its employees in matters of safety, insurance and liability.~~

(The following two paragraphs are from EEBB-AR. Please review to ensure it still reflects current practice.)

Employees using private vehicles for ESD business are subject to all applicable ESD policies and administrative regulations while the car is being used for ESD business.

If an employee uses a personal vehicle for ESD business and damage to the parked vehicle or loss of personal property from the vehicle occurs while the employee is conducting ESD business, the employee's personal automobile or homeowner's insurance is the primary carrier. [However, in such case, the ESD will reimburse an employee toward their personal insurance deductible in an amount up to [\$250]. Invoices showing the cost of repair or replacement and a copy of the applicable provisions in the employee's personal insurance policies shall be submitted with the expense account.]

END OF POLICY

Legal Reference(s):

[ORS 30.260 to -30.265](#)
[ORS 334.125\(7\)](#)
[ORS 801.455](#)

[ORS 811.210](#)
[ORS 815.055](#)
[ORS 815.080](#)

[OAR 581-024-0240](#)
[OAR 735-102-0010](#)

Lane Education Service District

Code: EEBB-AR
Adopted: 1/10/96
Readopted: 1/22/02
Orig. Code(s): EEBB-AR

Rules for Using Private Vehicles for ESD Business

Employees using private vehicles for ESD business are subject to all applicable ESD policies and administrative rules as long as the car is being used for ESD business.

If an employee uses a personal vehicle for ESD business and damage to the parked vehicle or loss of personal property from the vehicle occurs while the employee is conducting ESD business, the employee's personal automobile or homeowner's insurance is the primary carrier. However, in such case, the ESD will reimburse an employee toward his/her personal insurance deductible in an amount up to \$250. Invoices showing the cost of repair or replacement and a copy of the applicable provisions in the employee's personal insurance policies shall be submitted with the expense account.

Lane Education Service District

Code: EFA
Adopted: 9/26/06
Readopted: 2/24/15
Orig. Code(s): EFA

Local Wellness Program (Version 1)

The Board recognizes that childhood obesity has become an epidemic in Oregon as well as throughout the nation. Research indicates that obesity and subsequent diseases are largely preventable through diet and regular physical activity. Healthy eating patterns and increased physical activity are essential for students to achieve their academic potential, full physical and mental growth and lifelong health and well-being.

To help ensure students possess the knowledge and skills necessary to make healthy choices for a lifetime, the superintendent shall prepare and implement a comprehensive ESD nutrition program consistent with state and federal requirements for ESDs sponsoring the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP). The program shall reflect the Board’s commitment to providing adequate time for instruction that promotes healthy eating through nutrition education, serving healthy and appealing foods at ESD schools, developing food-use guidelines for staff and establishing liaisons with nutrition service providers, as appropriate.

The input of staff (including but not limited to, physical education and school health professionals), students, parents, the public, representatives of the school food authority and public health professionals will be encouraged. The superintendent will develop administrative regulations as necessary to implement the goals of this policy throughout the ESD.

Nutrition Promotion and Nutrition Education

Nutrition promotion supports the integration of nutrition education throughout the school environment. Nutrition education topics shall be integrated within the sequential, comprehensive health education program taught at every grade level, prekindergarten through grade 12, and coordinated with the ESD’s nutrition and food services operation.

Nutrition Guidelines

It is the intent of the Board that ESD schools be proactive in encouraging students to make nutritious food choices. All food and beverage items sold in a K-12 public school as part of the regular or extended school day shall meet the minimum state and federal standards. Exceptions to this requirement include items that are part of the USDA National School Lunch Program or School Breakfast Programs. Other exceptions are foods and beverages provided in the following instances:

1. When the school is the site of school-related events or events for which parents and other adults are a significant part of an audience; or
2. The sale of food or beverage items before, during or after a sporting event, interscholastic activity, a play, band or choir concert.

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Although the Board believes that the ESD's nutrition and food services operation should be financially self-supporting, it recognizes that the nutrition program is an essential educational and support activity. Therefore, budget neutrality or profit generation must not take precedence over the nutrition needs of its students. In compliance with federal law, the ESD's NSLP and SBP shall be nonprofit.

The superintendent is directed to develop administrative regulations to implement this policy that address all food and beverage items sold and/or served to students in ESD schools, including provisions for staff development, family and community involvement and program evaluation. These food and beverage items include competitive foods, snacks and beverages sold from vending machines and school stores, and similar food and beverage items from fund-raising activities and refreshments that are made available at school parties, celebrations and meetings.

Physical Activity

The Board realizes that a quality physical education program is an essential component for all students to learn about and participate in physical activity. Instruction, provided by adequately prepared teachers, will meet the state adopted academic content standards for physical education, ORS 329.045. Teachers of physical education shall regularly participate in professional development activities.

Students with disabilities shall have suitably adapted physical education incorporated as part of the individualized education program developed for the student under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them from participating in regular physical education instruction shall have suitably adapted physical education incorporated as part of an individualized health plan developed for the student by the ESD.

Physical activity should be included in a school physical education program for grades pre-K through 12. Physical activity should include regular instruction in physical education as well as co-curricular activities, and recess. The ESD will develop and assess student performance standards in order to meet the Oregon Department of Education's physical education content standards.

The superintendent is directed to develop administrative regulations to implement this policy, including such provisions as may be necessary to address all food and beverages sold and/or served to students at school (i.e., competitive foods, snacks and beverages sold from vending machines, school stores and fund-raising activities and refreshments that are made available at school parties, celebrations and meetings), including provisions for staff development, family and community involvement and program evaluation.

Reimbursable School Meals

The ESD may enter into an agreement with the Oregon Department of Education (ODE) to operate reimbursable school meal programs. The superintendent will develop administrative regulations as necessary to implement this policy and meet the requirements of state and federal law. These guidelines shall not be less restrictive than regulations and guidance issued by the Secretary of Agriculture pursuant to subsections (a) and (b) of section 10 of the Child Nutrition Act (42 U.S.C. 1779) and section 9(f)(1) and 17(a) of the Richard B. Russell National School Lunch Act (42 U.S.C. 1758(f)(1), 1766(a)(0)).

School Employee Wellness

The ESD encourages school staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale and a greater personal commitment to the ESD’s overall wellness program. Many actions and conditions that affect the health of school employees may also influence the health and learning of students. The physical and mental health of school employees is integral to promoting and protecting the health of students and helps foster their academic success. The ESD’s employee wellness program will promote health and reduce risk behaviors of employees and identify and correct conditions in the workplace that can compromise the health of school employees, reduce their levels of productivity, impede student success and contribute to escalating health-related costs such as absenteeism.

The ESD will work with community partners to identify programs/services and resources to compliment and enrich employee wellness endeavors.

Evaluation of the Local Wellness Policy

The Board will involve staff (including but not limited to, physical education and school health professionals), parents, students, representatives of the school food authority, public health officials, school administrators and the public in the development, implementation and periodic review and yearly update of this policy. In an effort to measure the implementation of this policy the Board designates the special education director as the person who will be responsible for ensuring the ESD meets the goals outlined in this policy. The ESD will make available to the public an assessment of the implementation, including the extent to which the schools are in compliance with policy, how the policy compares to model policy and a description of the progress being made in attaining the goals of this policy.

END OF POLICY

Legal Reference(s):

[ORS 329.531](#)
[ORS 327.537](#)
[ORS 329.496](#)
[ORS 334.125](#)

[ORS 336.423](#)
[OAR 581-051-051-0100](#)
[OAR 581-051-051-0305](#)

[OAR 581-051-051-0306](#)
[OAR 581-051-051-0310](#)
[OAR 581-051-051-0400](#)

Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. § 1758b (2018).
National School Lunch Program, 7 C.F.R. Part 210 (2022).
School Breakfast Program, 7 C.F.R. Part 220 (2022).
[House Bill 3199](#) (2023).

Lane Education Service District

Code:
Adopted:

EFA

Local Wellness

(Version 2)

The ESD supports providing reimbursable meals to its component districts?

(This policy is Required if the ESD operates a school and participates in a free or reduced-priced meal program with ODE.)

{Title 7 C.F.R. 210.31(a) requires local education agencies to “establish a local school wellness policy for all schools participating in the National School Lunch Program and/or School Breakfast Program...”. The law describes the policy as “a written plan that includes” various components intended to improve student wellness. This policy is designed to meet the requirements for a wellness policy and provide the framework for the ESD’s plan. Previously these requirements were split between the policy and an administrative regulation (AR). All required and/or related content is now included in the model policy, therefore OSBA recommends deleting the AR if the ESD previously included it in the board’s policy manual. ESDs should consult with stakeholders in the process of adoption and incorporate language that meets the unique needs of the ESD.}

The ESD is committed to the optimal development of every student and believes that a positive, safe and health-promoting learning environment is necessary for students to have the opportunity to achieve personal, academic, developmental and social success.

To help ensure students possess the knowledge and skills necessary to make healthy choices for a lifetime, the superintendent shall prepare and implement a comprehensive ESD nutrition program consistent with state and federal requirements for ESDs sponsoring the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP). The program shall reflect the Board’s commitment to providing adequate time for instruction that fosters healthy eating through nutrition education and promotion, serving healthy and appealing foods at ESD schools, developing food-use guidelines for staff and establishing liaisons with nutrition service providers, as appropriate.

[The superintendent or designee shall establish a Wellness Advisory Committee to advise the ESD in the development, review and update of the local wellness policy.]

POLICY IMPLEMENTATION, MONITORING, ACCOUNTABILITY AND COMMUNITY ENGAGEMENT

Implementation

The ESD shall manage and coordinate the implementation of this local wellness policy.

The Implementation will consist of, but not be limited to, the following:

1. Delineating roles, responsibilities, actions and timelines specific to each school;
2. Generating and disseminating information about who will be responsible to make what change, by how much, where and when;
3. Establishing standards for all foods and beverages provided (but not sold) to students during the
4. Establishing standards and nutrition guidelines for all foods and beverages sold to students during the school day on participating school campuses that meet state and federal nutrition standards for NSLP and SBP, competitive foods, permit marketing of same that meets the competitive food nutrition standards, and promotes student health and reduces child obesity; and

5. Establishing specific goals for nutrition promotion and education, physical activity[, physical education] and other school-based activities that promote student wellness.

The Board designates the [superintendent] [ESD principal(s)] to be responsible for ensuring each school meets the goals outlined and complies with this policy.

[Record Keeping

The ESD will retain the following records to document compliance with the local wellness policy requirements at the ESD's administrative offices:

1. The written local wellness policy;
2. Documentation to demonstrate the policy has been made available to the public;
3. Documentation of efforts to review and update the local wellness policy, including an indication of who participates in the update and the methods the ESD uses to make stakeholders aware of their ability to participate;
4. Documentation to demonstrate compliance with the annual public notification requirements;
5. Documentation of the ESD's most recent assessment on the implementation of the local wellness policy;
6. Documentation to demonstrate the most recent assessment on the implementation of the local wellness policy has been made available to the public.]

Notification of Policy

The ESD will inform the public about the content and implementation of the local wellness policy, and post the policy and any updates to the policy on the ESD website annually. Included will be, if available, the most recent assessment of the implementation, and a description of the progress being made in attaining the goals of the policy.

The ESD will publicize the name and contact information of the ESD or school official(s) leading and coordinating the policy and information on how the public can get involved with the local wellness policy. This information will be published on the ESD's website and in ESD communications.

Triennial Progress Assessments

At least once every three years, the ESD will evaluate the implementation of this policy and its progress with a triennial assessment and produce a progress report that will include:

1. The extent to which schools under the jurisdiction of the ESD are in compliance with the policy;
2. The extent to which the ESD's policy compares to model local school wellness policy^{1}; and
3. A description of the progress made in attaining the goals of the ESD's policy.

¹ {Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

The ESD will publish the triennial progress report on the ESD website when available. The ESD will update or modify the policy based on results of the triennial assessment.

Community Involvement, Outreach and Communications (Review of, and Updating Policy)^{2}

The ESD will actively communicate ways in which the community can participate in the development, implementation and periodic review and update of the local wellness policy. The ESD will communicate information about opportunities [in community news, on the ESD’s website, on school websites, and/or in ESD or school communications]. The ESD will ensure that communications are culturally and linguistically appropriate to the community.

Parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the Board, school administrators, and the general public will be solicited to participate in the periodic review and update of the local school wellness policy.

[Wellness Advisory Committee]^{3}

The ESD supports a wellness advisory committee to assist the development, implementation, and periodic review and update of the local wellness policy. The superintendent or designee will be a member of this committee.

The ESD will publicize information about the wellness advisory committee [in community news, in communications to parents, and/or on websites operated by the ESD] to communicate to parents, students and the community at large to explain the committee’s purpose, process and an invitation to volunteer.

1. The wellness advisory committee membership will include, to the extent possible, but not be limited to:
 - a. Parents, caregivers and students;
 - b. Representatives of the school nutrition program (e.g., school nutrition director);
 - c. Physical education and/or health education teachers;
 - d. School health professionals (e.g., school nurses, physicians, dentists, health educators and other allied health personnel who provide school health services);
 - e. Mental health and social services staff (e.g., school counselors, psychologists, social workers, or psychiatrists);
 - f. School administrators (e.g., superintendent, assistant superintendent, principal, vice principal);
 - g. Board members;
 - h. Supplemental Nutrition Assistance Program (SNAP) education coordinators;
 - i. Healthcare professionals and/or other health related professionals (e.g., dietitians, doctors, nurses, dentists); and
 - j. Members of the general public.

² {USDA Local school wellness policy [resource](#); CDC [resource](#); CDC Healthy Schools [resource](#); USDA Local school wellness policy [outreach toolkit](#) and communication resource from [Alliance for a Healthier Generation](#).}

³ {A Wellness Advisory Committee is not required. If the ESD chooses to have a committee, the ESD should amend the language here to establish the membership and responsibilities of the committee. [School Wellness Committee Toolkit](#) published by the Alliance for a Healthier Generation}

2. The committee, appointed by the superintendent or designee, will meet to organize and vote on a committee chair and a secretary prior to or at the beginning of the school year. The chair and secretary will serve for one year minimum and may be reappointed.
3. The wellness advisory committee will meet [four] times per year to review of the local wellness policy.
4. The committee will facilitate the development, review and update of the wellness policy, and evaluate each participating school’s compliance with the policy.

The ESD will create building-level committees to establish school-specific goals and activities that implement this policy. A school coordinator will be designated to support compliance with this policy.]

NUTRITION PROMOTION AND NUTRITION EDUCATION

Nutrition promotion and nutrition education positively influence lifelong eating behaviors by using evidence-based strategies and techniques and nutrition messages and by creating food environments that support healthy nutrition choices.

[Nutrition promotion and nutrition education shall be a sequential and integrated focus on improving students’ eating behaviors, reflect evidence-based strategies and be consistent with state and local district health education standards.]

To promote nutrition education in the schools, the principal is responsible for ensuring the following goals are implemented:

1. {⁴} [Students and staff will receive consistent nutrition messages throughout the school environment;
2. Nutrition education is provided throughout the student’s school years as part of the ESD’s age-appropriate, comprehensive nutrition program [(which includes the benefits of healthy eating, essential nutrients, nutritional deficiencies, principles of healthy weight management, the use and misuse of dietary supplements, safe food preparation, and handling and storage related to food and eating)], and is aligned and coordinated with the Oregon Health Education Standards and school health education programs;
3. Nutrition education will include culturally relevant, participatory activities that include social learning strategies and activities that are aligned and coordinated with the Oregon Health Education Standards and school health education programs;

Teachers will receive curriculum-specific training;

5. Parents and families are encouraged through school communications to send healthy snacks/meals and [reusable] water bottles with their student to school;
4. Families and community organizations are involved, to the extent practicable, in nutrition education;

⁴ {The goals listed are examples; ESDs are required to include goals in the policy. ESDs are encouraged to evaluate needs and resources and to develop specific goals. ESDs are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

7. Nutrition education homework that students can do with their families is assigned (e.g., reading and interpreting food labels, reading nutrition-related newsletters, preparing healthy recipes);
8. **P** Materials on how to assess one’s personal eating habits, set goals for improvement and achieve those goals.]

Nutrition promotion, including marketing and advertising nutritious foods and beverages to students, will be implemented consistently through a comprehensive and multi-channel approach, (e.g., in the classroom, cafeteria and at home) by staff, teachers, parents, students and the community.

To ensure adequate nutrition promotion, the following goals will be implemented:

1. ^{5}[Information about available meal programs is distributed prior to or at the beginning of the school year and at other times throughout the school year;
2. Information about availability and location of a Summer Food Service Program (SFSP) is distributed;
3. Nutrition promotion materials are sent home with students, published on the ESD website, and distributed at parent-teacher conferences;
4. Families are invited to attend exhibitions of student nutrition projects or health fairs;
5. Physical activity is a planned part of all school-community events.]

School Meals

[Schools within the ESD participate in U.S. Department of Agriculture (USDA) child nutrition program(s), administered through the Oregon Department of Education (ODE)[.] [which may include the NSLP[,] [and] [the SBP,] [Fresh Fruit & Vegetable Program (FFVP),] [After School Snack Program (ASSP),] [Special Milk Program (SMP),] [Summer Food Service Program (SFSP),] [Supper programs] [or others].] [The ESD also operates additional nutrition-related programs and activities including Farm-to-School programs, school gardens, Breakfast in the Classroom, Mobile Breakfast carts or Grab ‘n’ Go Breakfast.]

The school’s available meal program(s) operate to meet meal pattern requirements and dietary specifications in accordance with the Healthy, Hunger-Free Kids Act and applicable federal laws and regulations.

The [principal(s)] will support nutrition and food services operation as addressed in Board policy EFAA – ESD Nutrition and Food Services and its accompanying administrative regulation EFAA-AR – Reimbursable Meals and Milk Programs.

[Water

Free, safe, unflavored, drinking water will be available to all students throughout the school day and throughout every school campus. The ESD will make drinking water available where school meals are served during mealtimes.]

⁵ {The goals listed are examples; ESDs are required to include goals in the policy. ESDs are encouraged to evaluate needs and resources and to develop specific goals. ESDs are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

Competitive Foods and Beverages

The ESD controls the sale of all competitive foods. All foods and beverages outside the reimbursable school meal programs that are sold to students on the school campus during the school day will meet or exceed Smart Snacks Standards⁶. These standards will apply in all locations and through all services where foods and beverages are sold, which may include, but are not limited to, à la carte options in cafeterias, vending machines, school stores, snack or food carts and fund raising.

Celebrations and Rewards/Incentives

All foods and beverages offered on the school campus [will meet or exceed] [are encouraged to meet] the nutrition standards set by the USDA and the Oregon Smart Snacks Standards. This includes, but is not limited to, celebrations, parties, and classroom snacks brought by parents. [Food will not be used as a reward or incentive.] [This information will be conveyed to staff and parents.]

[Fund Raising

Foods and beverages that meet or exceed the nutrition standards set by the USDA and the Oregon Smart Snacks Standards may be sold through fund raisers on the school campus during the school day. Such requests to conduct a fund raiser will be submitted to the [principal] for approval before starting.]

Food and Beverage Marketing in Schools

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the nutrition standards for competitive foods set by the USDA.

[The ESD (i.e., school nutrition services, athletics department, PTA, PTO) will review existing contracts, new contracts and equipment, and product purchase or replacement to reflect the applicable food and beverage marketing guidelines.]

PHYSICAL ACTIVITY AND PHYSICAL EDUCATION

A quality physical education program is an essential component for all students to learn about and participate in physical activity. The ESD will develop and assess student performance standards and program minute requirements in order to meet ODE's physical education content standards and state law.

Physical activity should be included in the school's daily education program for grades [pre-]K through 12 and include regular, instructional physical education, as well as co-curricular activities and recess.

In order to ensure students are afforded the opportunity to engage in physical education and physical activity in the school setting, the following goals are established:

1. {7}[Physical education will be a course of study that focuses on students' physical literacy and development of motor skills;

⁶ Oregon Department of Education, [Oregon Smart Snacks Standards](#)

⁷ {The goals listed are examples; ESDs are required to include goals in the policy. ESDs are encouraged to evaluate needs and resources and to develop specific goals. ESDs are required to "review and consider evidence-based strategies and techniques" (7

2. Staff encourages and provides support for parental involvement in their children’s physical education;
3. Physical education courses will be the environment where students learn, practice and are assessed on developmentally appropriate knowledge, skills and confidence to become physically literate;
4. Instruction, provided by adequately prepared teachers, i.e., licensed or endorsed to teach physical education, will meet the state adopted academic content standards for physical education (Oregon Revised Statute (ORS) 329.045). Teachers of physical education shall regularly participate in professional development activities annually;
5. {8} Every public school student in [pre-]kindergarten through grade 8 shall participate in physical education for the entire school year. Students in kindergarten through grade [5] [6] shall participate for at least 150 minutes during each school week, and students in grades [6] [7] through 8 for at least an average of 150 minutes during each school week, as calculated over the duration of a school year;
6. Physical activity will be integrated across curricula and throughout the school day. Movement will be made a part of all classes or courses as part of a well-rounded education;
7. Physical activity during the school day (including, but not limited to, recess, classroom physical activity breaks or physical education) will not be used as a punishment or a reward;
8. {9} At least 50 percent of the weekly physical education class time in grades K through 8 shall be devoted to actual physical activity;
9. Physical activity is a planned part of all school-community events;
10. Materials promoting physical activity are sent home with students and published on the ESD website.]

[{10} A student with a disability shall have suitably adapted physical education incorporated as part of their individualized education program (IEP) developed under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them from participating in regular physical education instruction, shall have suitably adapted physical education incorporated as part of their individualized health plan, developed by the ESD.]

Other Activities that Promote Student Wellness

The ESD will integrate wellness activities throughout the entire school environment. The ESD will coordinate and integrate other initiatives related to physical activity, physical education, nutrition and other wellness components so all efforts are complementary, not duplicated and work toward the same set of goals promoting student well-being, optimal development and strong educational outcomes.

CFR 210.31(c)(1)). Model Wellness Policy resource published by the [Alliance for a Healthier Generation](#). OSBA makes no representation of its compliance by providing this resource.}

⁸ {ESDs are required to provide the specified number of physical education minutes, but are not required to include them as goals or in this policy. If the ESD operates K-5 elementary schools, select “5” in the first bracket and “6” in the second bracket. If the ESD operates K-6 elementary schools, select “6” in the first bracket and “7” in the second bracket.}

⁹ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

¹⁰ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

The ESD will provide the following activities and encourage the following practices which promote local wellness:

1. [Scoliosis screenings;
2. Safe Routes to Schools Program;
3. Physically active family and community engagement activities for families to learn about healthy eating or to practice being active together (e.g., skate night, fun run, dance night);
4. Nonfood-related fund raisers;
5. Physical activity energizers during transitions from one subject to another;
6. Intramural sports;
7. Monthly/Weekly school walks;
8. Assemblies which focus on wellness issues such as the importance of breakfast, healthy beverages, and how students and staff can incorporate 60 minutes of physical activity into their day;
9. Use of alternates to food as rewards in the classroom;
10. Creation of connections between out-of-school time (OST) programs that involve staff members from OST programs, both school- and community-based, in school initiatives that address healthy eating, such as school wellness teams or wellness committees;
11. Integration of social, emotional and mental health supports into school programs (e.g., promote a positive school climate where respect is encouraged and students can seek help from trusted adults);
12. Communication between classroom teachers and nutrition staff, so that menus and nutrition promotion can be tied into classroom learning and coursework;
13. Include wellness as a standing agenda item for school-based meetings (e.g., staff meetings, site council meetings, PTO).]

[¹¹} **Employee Wellness** {¹²}

The ESD encourages staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale and a greater personal commitment to the school's overall wellness program. Many actions and conditions that affect the health of staff may also influence the health and learning of students. The physical and mental health of staff is integral to promoting and protecting the health of students and helps foster their academic success. The ESD's Employee Wellness Program will promote health, reduce risky behaviors of employees and identify and correct conditions in the workplace that can compromise the health of staff, reduce their levels of productivity, impede student success and contribute to escalating health-related costs such as absenteeism.

¹¹ {This language is optional and is not required by state or federal law.}

¹² {CDC resources for [school employee wellness](#) and [workplace health promotion](#)}

The ESD will collaborate with community partners to identify programs, services and/or resources to compliment and enrich employee wellness endeavors.

The ESD's Employee Wellness Program [may] include the following:

1. Health education and health promoting activities that focus on skill development and lifestyle behavior that change along with awareness building, information dissemination, access to facilities, and are preferably tailored to employees' needs and interests;
2. Safe, supportive social and physical environments including organizational expectations about healthy behavior, and implementation of policy that promotes health and safety and reduces the risk of disease;
3. Linkage to related programs such as employee assistance programs, emergency care and programs that help employees balance work life and family life;
4. Education and resources to help employees make decisions about health care; and
5. Nutrition and fitness educational opportunities that may include but are not limited to, the distribution of educational and informational materials, and the arrangement of presentations and workshops that focus on healthy lifestyles, health assessments, fitness activities and other appropriate nutrition and physical activity related topics.

The ESD encourages participation from all employees. "Employees" are not limited to instructional staff (i.e., teachers and instructional assistants), but includes all administrators and support staff.

The following groups are seen as essential for establishing, implementing and sustaining an effective employee wellness program:

1. School personnel who implement existing wellness programs in the ESD (i.e., employee wellness committee);
2. ESD personnel who implement health programs for students (e.g., school health coordinator, school nurses, psychologist, health and physical educators, nutrition professionals, counselors and other staff); and
3. Decision makers who have the authority to approve policy and provide administrative support essential for a school wellness program (e.g., Board members, superintendents, human resource administrators, fiscal services administrators and principals).]

[DEFINITIONS

1. "Competitive food" means all food and beverages other than meals reimbursed under programs authorized by the Richard B. Russell National School Lunch Act and the Child Nutrition Act available for sale to students on the school campus during the school day.
2. "Food and beverage marketing[13]" is defined as advertising and other promotion in schools. Food and beverage marketing often includes an oral, written or graphic statement made for the purpose of

¹³ [This term includes, but is not limited to, the following: brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container; displays, such as on vending machine exteriors; corporate brand, logo, name or trademark on school equipment, such as marquee, message boards, scoreboards or backboards (Note: Immediate replacement of these items is not required; however, ESDs will replace or update scoreboards or other durable equipment when existing contracts are up for renewal or to the extent that is financially possible over time so that items are in compliance.);

promoting the sale of a food or beverage product made by the producer, manufacturer, seller or any other entity with a commercial interest in the product.

3. “Oregon Smart Snacks Standards”¹⁴ means the State’s minimum nutrition standards for competitive foods and beverages (ORS 336.423).
4. “School day” means, for the purpose of competitive food standards implementation, the period from the midnight before, to 30 minutes after the end of the official school day[, i.e., at the conclusion of afternoon student activities, such as athletic, music or drama practices, clubs, academic support and enrichment activities].
5. “School campus” means, for the purpose of competitive food standards implementation, all areas of property under the jurisdiction of the school that are accessible to students during the school day.]

END OF POLICY

Legal Reference(s):

[ORS 329.531](#)
[ORS 327.537](#)
[ORS 329.496](#)
[ORS 334.125](#)

[ORS 336.423](#)
[OAR 581-051-051-0100](#)
[OAR 581-051-051-0305](#)

[OAR 581-051-051-0306](#)
[OAR 581-051-051-0310](#)
[OAR 581-051-051-0400](#)

Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. § 1758b (2018).
National School Lunch Program, 7 C.F.R. Part 210 (2022).
School Breakfast Program, 7 C.F.R. Part 220 (2022).

[House Bill 3199](#) (2023).

corporate brand, logo, name or trademark on cups used for beverage dispensing, menu boards, coolers, trash cans and other food service equipment; as well as on posters, book covers, student assignment books or school supplies displayed, distributed, offered or sold by the ESD; advertisements in school publications or school mailings; free product samples, taste tests or coupons of a product, or free samples displaying advertising of a product.]

¹⁴ Oregon Department of Education, [Oregon Smart Snacks Standards](#)

Lane Education Service District

Code: EFAA
Adopted:

ESD Nutrition and Food Services

(Required if the ESD operates a school and receives reimbursement meal services from ODE.)

The ESD supports providing reimbursable meals to its component districts?

The ESD may enter into an agreement with the Oregon Department of Education (ODE) to operate the National School Lunch Program (NSLP) and the Commodity Food Distribution Program (CFDP) by signing a permanent Sponsor-ODE Agreement entitling the ESD to receive reimbursement for all meals that meet program requirements and to earn USDA Food entitlement based on the number of lunches served.

The permanent agreement shall be signed by the superintendent or other ESD official with authority to obligate the ESD to legally binding contracts, subject to annual ODE renewal and will include, at the ESD's option, an agreement to operate the School Breakfast Program (SBP), Summer Food Service Program (SFSP), the Child and Adult Care Food Program (CACFP) and the Special Milk Program (SMP). The ESD recognizes that meals and snacks served by the ESD will not be eligible for reimbursement until the annual program update is received and approved by ODE.

The permanent Sponsor-ODE Agreement shall include assurances by the ESD that it will follow all Child Nutrition Program regulations for which the ESD is approved to operate:

1. Free and reduced price process (updated annually);
2. Financial management of the nonprofit school food service;
3. Civil rights and confidentiality procedures;
4. Meal pattern and nutrition content of meals served;
5. Use and control of commodity foods;
6. Accuracy of reimbursement claims;

Food safety and sanitation inspections;

8. Nutrition standards for foods and beverages sold to students.

7. The superintendent will develop an administrative regulation as necessary to implement this policy and meet the requirements of state and federal law. The administrative regulation will be reviewed and adopted by the Board as required by law.

END OF POLICY

Legal Reference(s):

[ORS 327.520 to -327.537](#)

[ORS 336.423](#)

Nondiscrimination on the Basis of Handicap in Programs or Activities Receiving Federal Financial Assistance, 7 C.F.R. Part 15b (2017).
U.S.D.A., ELIGIBILITY GUIDANCE FOR SCHOOL MEALS MANUAL.
U.S.D.A., FNS INSTRUCTION 765-7, REV. 2 HANDLING LOST, STOLEN AND MISUSED MEAL TICKETS.
Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. §§ 1758, 1760 (2012).
National School Lunch Program 7 C.F.R. Part 210 (2017).
U.S.D.A. Instruction 113-1 Civil Rights
Donation of Foods for Use in the United States, Its Territories and Possessions and Areas Under its Jurisdiction, 7 C.F.R. Part 250 (2017).
Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. 200 (2017).

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Lane Education Service District

Code:
Adopted:

EFAA-AR

Reimbursable Meals and Milk Programs

(National School Lunch Program, School Breakfast Program, Special Milk Program and other meal programs)

(Required if the ESD operates a school and receives reimbursement for meal services from ODE.)

The ESD's nutrition and food services will be operated in accordance with the following requirements:

Meal Pricing Procedure

1. The ESD may operate the Special Milk Program (SMP) at schools where students do not have access to program meals. Under SMP, the ESD will choose one of the following options:
 - a. Nonpricing (serve SMP milk at no charge to all students);
 - b. Pricing programs without a free option (charge all students for SMP milk); or
 - c. Pricing programs with a free option (distribute confidential applications for free milk and charge only those students for SMP milk who do not qualify for free milk based on the household's application or direct certification from Supplemental Nutrition Assistance Programs (SNAP)).
2. Reimbursable meals ~~and afterschool snacks~~ will be priced as a unit.
3. Reimbursable meals~~,~~ ~~and~~ ~~milk~~ ~~afterschool snacks~~ will be served free or at a reduced price to all children who are determined by the ESD to be eligible for free or reduced price meals ~~and free milk~~.
4. Annually, the ESD will establish prices for reimbursable student meals~~,~~ ~~and~~ ~~afterschool snacks~~ ~~milk~~. The price charged to students who do not qualify for free or reduced price meals ~~or free milk~~ will be established annually by the ESD in compliance with state and federal laws.
5. The price charged to students who qualify for reduced price meals will be established annually by the ESD in compliance with state and federal laws.
6. ~~The ESD will offer SMP [with the free option] [without the free option] [at no charge] to students who are not able to participate in the ESD's lunch or breakfast programs.~~
- 7.6. ~~The ESD will implement claiming alternative Provision [1] [2] [3] at the following schools under its jurisdiction: (list schools) .~~
- 8.7. ~~The ESD will implement claiming alternative Community Eligibility at the following schools under its jurisdiction: Lane School (list schools) .~~

Application Procedures

1. Households receiving SNAP or Temporary Assistance to Needy Families (TANF) benefits, as identified by Oregon Department of Education (ODE), will be automatically eligible for free

meals[,] [and] [afterschool snacks] [milk] for the students listed on the official document. The ESD must access this document at least three times per year.

2. Students receiving support through the migrant education program, Runaway and Homeless Youth Act, McKinney-Vento Homeless Assistance Act, federal Head Start and state-funded prekindergarten programs, with income eligibility criteria identical or more stringent than federal Head Start, or are in state or court placement foster care, will be automatically eligible for free meals[,] [and] [afterschool snacks] [milk], for the students listed on the official documents.
3. Households that submit a confidential application will be notified of their student’s eligibility for free or reduced price meals [or free milk]. Households that are denied free or reduced price benefits will be notified in writing using the ODE template letter distributed to the ESD annually.
4. On a case-by-case basis, when a student is known to be eligible for free or reduced price meal [or free milk] benefits and the household fails to submit a confidential application, the superintendent or designee may complete an application for the student documenting how they know the household income qualifies the student for free or reduced price meal benefits. Parents of a student approved for free or reduced price benefits, when application is made for the student by an ESD official, will be notified of the decision and given the opportunity to decline benefits.
5. Students who do not qualify for free or reduced price meals [or free milk] are eligible to participate in the [SMP,] National School Lunch Program (NSLP) [and School Breakfast Program (SBP)] and will be charged “paid” prices set by the ESD. “Paid” category students will be treated equally to students receiving free or reduced price benefits in every aspect of the ESD’s NSLP[,] [and] [SMP] and [SBP] [Child and Adult Care Food Program (CACFP)] [Summer Food Service Program (SFSP)].
6. The ESD has established a fair hearing process under which a household can appeal a decision with respect to the household’s application for benefits or any subsequent reduction or termination of benefits.
7. In the event of major employers contemplating large layoffs in the attendance area of the ESD, the ESD will provide confidential applications and eligibility criteria for free and reduced price meals [or free milk] to the employer for distribution to affected employees.

Financial Management of the Nonprofit School Food Service

1. The ESD will maintain a nonprofit nutrition and food service operation.
2. Revenues earned by the nutrition and food services will be used only for the operation or improvement of NSLP[,] [and] [SMP] and [SBP] [CACFP] [SFSP].
3. Lunch and breakfast meals served to teachers, administrators, custodians and other adults not directly involved with the operation of the ESD’s nutrition and food services will be priced to cover all direct and indirect cost of preparing and serving the meal.¹

¹ For meals with portion sizes equivalent to student meals, the adult meal price will be no less than the amount of reimbursement for a free-eligible meal, plus the value of commodity foods used in the meal preparation.

4. The ESD nutrition and food services revenues will not be used to purchase land or buildings.
5. The ESD will limit its nutrition and food services net cash resources to an amount that does not exceed three months average expenditures.
6. The ESD will maintain effective control and accountability for, and adequately safeguard, all nutrition and food services' cash, real and personal property, equipment and other assets, and ensure they are used solely for nutrition and food services purposes.
7. The ESD will meet the requirements for allowable NSLP[,][and][SMP] and [SBP][CACFP][SFSP] costs as described in 2 C.F.R. 200.
8. In purchasing nutrition and food services goods or services, the ESD will not accept proposals or bids from any party that has developed or drafted specifications, requirements, statements of work, invitations for bids, requests for proposals, contract terms and conditions or other documents for proposals used to conduct the procurement.
9. All procurement transactions for nutrition and food services goods and services will be conducted according to state, federal and ESD procurement standards using the applicable cost thresholds.
10. In the operation of its nutrition and food services program, the ESD will purchase food products where at least 50 percent of the ingredients are produced or processed in the United States, whenever possible.
11. ~~The ESD may use facilities, equipment and personnel supported with nutrition and food services revenue to support a nonprofit nutrition program for the elderly.~~

Civil Rights and Confidentiality Procedures

1. The ESD will not discriminate against any student because of their eligibility for free or reduced
2. The ESD will not discriminate against any student or any nutrition and food services employee because of race, color, national origin, marital status, sex, sexual orientation, parental status, ~~price meals,~~ religion, age or disability.
3. The ESD will assure that all students and nutrition and food services employees are not subject to different treatment, disparate impact or a hostile environment.
4. Established ESD procedures will be followed for receiving and processing civil rights complaints related to applications for NSLP[,][and][SMP] and [SBP][CACFP][SFSP] benefits and services, and employment practices with regard to the operation of its NSLP[,][and][SMP] and [SBP][CACFP][SFSP]. The ESD will forward any civil rights complaint regarding the ESD's nutrition and food services to ODE's director of Child Nutrition Programs within three days of receiving the complaint.
5. The ESD will make written or oral translations of all nutrition and food services materials available to all households who do not read or speak English.
6. The ESD will maintain strict confidentiality of all information obtained through a confidential application for free and reduced price meals ~~for free milk~~ or direct certification, including students'

eligibility for free or reduced price meals and all household information. The ESD's NSLP~~[,]~~~~[and]~~ ~~[SMP]~~ and ~~[SBP]~~~~[CACFP]~~~~[SFSP]~~ operators are not required to release any information from a student's confidential application for free or reduced price meals ~~[or free milk]~~. No information may be released from a student's eligibility information without first obtaining written permission from the student's parent or legal guardian/adult household member signing the application, except as follows:

- a. An individual student's name and eligibility status may be released without written consent only to persons who operate or administer federal education programs; persons who operate or administer state education or state health programs at the state level; persons evaluating state, education assessment; or persons who operate or administer any other NSLP, SBP, SMP, CACFP, SFSP or SNAP.
- b. Any other confidential information contained in the confidential application for free and reduced price meals ~~[or free milk]~~ (e.g., family income, address, etc.) may be released without written consent only to persons who operate or administer the NSLP, SBP, SMP, CACFP, SFSP and the Special Supplemental Nutrition Program for Women, Infants and Children (WIC); the Comptroller General of the United States for audit purposes; and federal, state or local law enforcement officials investigating alleged violation of any of the programs listed above.

Nutrition and Menu Planning

1. Meals and afterschool snacks served for reimbursement will meet the nutrition standards established by the U.S. Department of Agriculture (USDA) and Oregon Smart Snacks Standards.
2. Meals ~~[and afterschool snacks]~~ served for reimbursement will meet at least the minimum NSLP~~[,]~~ ~~[and]~~ ~~[SBP]~~ ~~[CACFP]~~ ~~[SFSP]~~ requirements for food items and quantities.
3. Meals served for reimbursement will:
 - a. Meet all calorie range requirements by grade level;
 - b. Meet the maximum standards set for saturated fat;
 - c. Meet the maximum standards set for sodium by grade level; and
 - d. Meet the requirement for zero grams of trans fats.
4. The ESD will use the offer versus serve option when serving NSLP lunches to senior high school students. High school students must take at least three of five different food items including one-half cup of fruit or vegetable offered in program lunches.
5. **[**The ESD will use the offer versus serve option when serving program breakfasts to senior high school students. High school students must take at least three of four food items including one-half cup of fruit or vegetable offered in program breakfasts.]
6. **[**The ESD will use the offer versus serve option when serving program lunches to students below senior high school grades. Students below high school grades will be required to take three of the five food items, including one-half cup of fruit or vegetable offered in program lunches.]
7. **[**The ESD will use the offer versus serve option when serving program breakfasts to students below senior high school grades. Students below high school grades will be required to take three of the four food items, including one-half cup of fruit offered in program breakfasts.]

8. A copy of the Board minutes adopting the offer versus serve policy for students below high school grades for program lunches and/or for all students in the ESD for program breakfasts, as applicable, will be made available upon request.

Use and Control of Commodity Foods

1. The ESD will accept and use commodity foods in as large a quantity as may be efficiently utilized in the NSLP[,] and] [SBP][SFSP].
2. The ESD will maintain necessary safeguards to prevent theft or spoilage of commodity foods.
3. The value of commodity foods used for any food production other than NSLP, SBP, SFSP or afterschool snacks shall be replaced in the food service inventory.

Accuracy of Reimbursement Claims

1. The ESD will claim reimbursement only for reimbursable meals[,] [and] [afterschool snacks] [milk] served to eligible children.
2. All meals[,] [and] [afterschool snacks] [milk] claimed for reimbursement will be counted at each dining site at a “point of service” where it can be accurately determined that the meal[,] [and] [afterschool snack] [milk] meets NSLP[,] [and] [SMP] [SBP] [CACFP] [SFSP] requirements for reimbursement.
3. The person responsible for determining if the meals [and afterschool snacks] are reimbursable will be trained to recognize a reimbursable meal.
4. The ESD official signing the claim for reimbursement will review and analyze monthly meal[,] [and] [afterschool snack] [milk] counts to ensure accuracy of the claim, before submitting the claim to ODE.
5. Annually, by November 15, the ESD will verify a random sample of applications according to NSLP verification requirements. Instructions for completing the verification process will be sent by ODE to the ESD in October each year.

Food Safety and Sanitation Inspections

1. The ESD will maintain necessary facilities for storing, preparing and serving food and milk.
2. Semiannually, the ESD will schedule food safety inspections with the county Environmental Health Department for each school or dining site under its jurisdiction.
3. The ESD will maintain health standards in compliance with all applicable state food safety regulations at each school or dining site under its jurisdiction.

General USDA NSLP/SBP/SMP Requirements

1. The ESD will ensure that no student is denied a meal as a disciplinary action.
2. Breakfast will be served in the morning hours, at or near the beginning of the student’s school day.

3. Lunch will be served between the hours of 10 a.m. and 2 p.m.
 4. The ESD will provide substitute foods for students with a disability² that restricts their diet when supported by a written statement from a state-licensed health care professional, who is authorized to write medical prescriptions. Substitutions will be provided only when a medical statement from the licensed health care professional is on file at the ESD. The medical statement must state the nature of the child's impairment so its effect on the student's diet is understood, and what must be done to accommodate the impairment. The ESD will not charge more than the price of the school meal, as determined by the child's eligibility status, for meals with the accommodation.
 5. The ESD will control the sale of competitive foods.
 6. The ESD will ensure that potable [drinking] water will be available to students, free of charge for consumption in the place where meals are served during meal service.
 7. The ESD will notify all households and appropriate staff of its meal charge requirements³ at the beginning of each school year, upon enrollment of a student or the transfer of a student. The meal charging requirements will be [posted on the ESD website,] [published in the student/parent handbook] [and made available in the information on free and reduced-priced meals].
- [⁴Regardless of the ability to pay, a student shall be provided a reimbursable meal upon request. Parents or guardians may provide written permission to the ESD to withhold a meal from a student. After five meal charges the ESD will attempt to certify the student for free or reduced-price meals. At least two attempts to contact the student's parent or guardian for completing a meal application will be made by the ESD, including offering assistance filling out the application, if appropriate. Communications regarding student charges will be directed to parents or guardians, only.] [The ESD may refer delinquent meal charges to third parties for collection. Collection fees will not be charged to the parent or guardian.]
8. The sale of foods in competition with the ESD's lunch (NSLP) or breakfast (SBP) programs will be allowed in dining sites during lunch and breakfast periods with Board approval only when all income from the food sales accrues to the benefit of the ESD's nutrition and food services or accrues to a school or student organization approved by the Board. A copy of the Board minutes approving and defining competitive food sales will be made available upon request.
 9. [Students ~~will~~] [will not] be charged for second servings of meals or portions of meals served.]

² To comply with Section 504 as it relates to a student's severe food allergy, such as milk, gluten, nut or soy, and including but not limited to diabetes, colitis, etc.

³ [Federal law requires the ESD to publish meal charging requirements. The ESD's charging requirements must identify how and when the information about account balances is communicated to staff, students and parents, and what collection methods will be used in delinquent balances.]

⁴ [Pursuant to ORS 327.535 the following language reflects required practice, but the language is not required to be in policy.]

Record Keeping

The following documents will be maintained by the ESD for three years after the current school year or longer, in the event of an unresolved audit(s), until the audit(s) has been completed:

1. All currently approved and denied confidential applications for free and reduced price meals[, free milk,] all current direct certification documents, eligibility verification documents and school membership or enrollment lists;
2. Financial records that account for all revenues and expenditures of the ESD's nonprofit nutrition and food services programs, including procurement documents;
3. Records (i.e., recipes, ingredient lists and nutrition fact labels or product specifications) that document the compliance with nutrition standards for all program and competitive foods available for sale to students at a school campus;
4. Documents of participation data (i.e. meal counts) from each school operated by the ESD to support claims for reimbursement;
5. Production and menu records;
6. Records to document compliance with Paid Lunch Equity;
7. Records to document compliance with Revenue from Nonprogram Foods; and
8. Internal program monitoring documents for NSLP[,][and][SBP][afterschool snacks][CACFP][SFSP].

Lane Education Service District

Code: EGAAA
Adopted: 4/26/94
Readopted: 1/22/02
Orig. Code(s): EGAAA

Reproduction of All Copyrighted Materials (Version 1)

The Board recognizes that the unlawful copying of copyrighted materials contributes to higher costs for materials, lessens the incentives for development of qualified educational materials, fosters an attitude of disrespect for law which is in conflict with the educational goals of Lane ESD and puts the ESD at risk of litigation.

The Board directs that ESD employees adhere to the provisions of Public Law 94-553 and subsequent federal legislation and guidelines related to the duplication and/or use of copyrighted materials, only permitting copying specifically allowed by copyright law, fair use guidelines, license agreements or proprietor's permission.

Appropriate notice will be posted on or near all equipment capable of making copies.

The Board further directs that:

1. Employees shall not make unlawful copies of copyrighted materials on ESD-owned equipment;
2. Employees shall not use unlawful copies of copyrighted materials with or on ESD-owned equipment, within ESD-owned facilities or ESD-sponsored functions;
3. Employees shall not direct other employees under their supervision to make or use unlawful copies of copyrighted materials;
4. Employees who unlawfully copy and use copyrighted materials or direct others to do so are not acting within the course and scope of their employment and will be individually liable for any violation of state or federal laws;
5. Employees who willfully violate this policy will be disciplined.

The Board directs that all staff members be provided opportunities to become and remain knowledgeable about copyright law and guidelines as related to job responsibilities.

In order to implement this policy, the Board directs the superintendent to appoint a staff member or members to serve as copyright officers. It shall be the responsibility of the copyright officers to coordinate the development of administrative rules detailing what copying can and cannot be done by ESD employees, retention of appropriate copyright records, training opportunities and a collection of reference materials related to copyright.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

Copyrights, 17 U.S.C. §§ 101-1332; 19 C.F.R. Part 133 (2012).

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Lane Education Service District

Code:
Adopted:

EGAAA

Reproduction of All Copyrighted Materials

Among the facilities available to teachers in carrying out their educational assignments are a variety of machines for reproducing the written and spoken word, either in single or multiple copies.

Infringement on copyrighted material, whether prose, poetry, graphic images, music, audiotape, video or computer-programmed materials, is a serious offense against federal law and contrary to the ethical standards required of staff and students alike.

Violations may result in criminal or civil suits.

The Board therefore requires that all reproduction of copyrighted material be conducted strictly in accordance with applicable provisions of law. Unless otherwise allowed as “fair use” under federal law, permission must be acquired from the copyright owner prior to reproduction of material in any form.

“Fair use” is not a rigidly defined term. “Fair use” is based on the following standards:

1. The purpose and character of the use;
2. The nature of the copyrighted work;
3. The amount of and the substantiality of the portion used;
4. The effect of the use upon the potential market for, or value of, the copyrighted work.

If an individual questions the legality of duplicating materials, they should seek permission from the copyright holders.

Employees in violation of copyright law may be required to remunerate the ESD in the event of loss due to litigation and may be subject to discipline up to and including dismissal.

The superintendent or designee will provide [guidelines] [administrative regulations] for the “fair use” of copyrighted materials that meet the requirements of Section 107 of the Copyright Act of 1976 and applicable amendments.

The superintendent or designee shall [annually] [regularly] review and update the ESD copyright guidelines, arrange for staff to have familiarity with and implement ESD copyright policy and guidelines and to act as a resource to staff members regarding copyright laws, regulations, ESD policies and ESD copyright guidelines.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

Copyrights, 17 U.S.C. §§ 101-1332; 19 C.F.R. Part 133 (2012).

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Lane Education Service District

Code: EGAAA-AR
Adopted: 1/11/95
Revised/Readopted: 1/22/02
Orig. Code(s): EGAAA-AR

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Use of Copyrighted Materials

The media services manager is appointed as the ESD copyright officer.

The copyright officer shall annually review and update the ESD copyright guidelines, arrange for staff to have familiarity with and implement ESD copyright policy and guidelines and to act as a resource to staff members regarding copyright laws, regulations, ESD policies and ESD copyright guidelines.

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Lane Education Service District

Code: EGAB
Adopted: 3/29/94
Readopted: 1/22/02
Orig. Code(s): EGAB

Courier Service

(This is part of operations/internal procedure. Does not generally rise to the level of board policy.)

The Board of the Lane Education Service District recognizes the establishment of a courier program to provide approved service to its component districts and other approved agencies.

This policy prohibits the use of the courier service where other legitimate options are more appropriate and/or cost effective including but not limited to the U.S. Postal Service and private carriers such as United Parcel Service.

The courier service will provide the delivery and pick-up of ESD Media Library materials, the delivery of items from other ESD departments, interdistrict and interagency communications and the pick-up and delivery of audiovisual material and equipment.

It shall be the responsibility of the administration to develop and maintain administrative rules and guidelines which conform to the intent of this policy. These procedures will include but not be limited to the development of schedules which provide the required services in a cost effective manner, guidelines for courier use and the regulations for monitoring use of courier service.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

Perry Education Association v. Perry Local Educator's Association, 460 U.S. 37 (1983).

University of California v. PERB, 485 U.S. 589 (1988).

Lane Education Service District

Code: EGAB-AR
Adopted: 4/15/94
Revised/Readopted: 1/22/02
Orig. Code(s): EGAB-AR

Guidelines for Use of Courier Service

(Does not rise to AR level; internal procedure.)

The administrative rules for courier service require standards for ESD use, interschool and interdistrict use and use by entities other than public schools.

ESD Use

1. Instruction for multiple copy mailings

Each component district will provide the ESD with the procedure to be used to provide mailings to the district. These procedures apply to all multiple copy materials which are to be disbursed and generally will be limited to the following options:

- a. Send materials to the superintendent for distribution;
- b. Send materials to the curriculum coordinator for distribution with a copy to the superintendent;
- c. Send materials to a specific division within the district for review and distribution.

2. Specific or Individual Mailings

These are to be sent directly to the individual for whom the correspondence is addressed.

3. Materials for Distribution to Students

All materials intended for direct distribution to students or for student information shall be pre-approved by the ESD media services manager under the guidelines for all other materials; however, it shall be the component district or building responsibility to determine if said materials may be distributed in the building according to individual building procedures.

Interschool and Interdistrict Correspondence

The standard format for addressing interschool correspondence is to be complied with by those individuals using the ESD courier service. This format includes:

1. Cross out all previous addresses found on both sides of any envelopes you are using;
2. Addresses should be clearly marked FROM and TO as well as legibly addressed (we prefer having the FROM on the left side and the TO on the right side as you would find it on a U.S. mailing, however, we realize some districts do have preprinted labels which are opposite);
3. Include a return address in case the mail needs to be returned due to an improper or illegible address;
4. When sending correspondence to the ESD please include the department to which it is being sent and the name of the particular person to whom the correspondence is directed, if known;

5. When sending mail to schools please include the name of the school as well as the name of the person to receive the mail;
6. If the envelope you are using is clearly marked FROM-TO or vice versa please follow the same sequencing. If you do change directions midway be very sure previous directions are thoroughly crossed out and your change is boldly marked;
7. If sending to a specific department such as accounting, please include name of the district or Lane ESD so that it does not get delivered to the wrong institution;
8. If the material is highly confidential or includes a sum of money, please use special care in sealing and clearly identifying the envelope;
9. This service is not intended to supplement or to replace the service provided by the U.S. Postal Service. The postal service must be used for all personal correspondence.

Other Agencies

The following rules apply to the use of courier service by agencies other than public schools:

1. Requests will be considered only from other governmental agencies and organizations involved in civic services with a relationship to education;
2. All requests for the use of the courier service by agencies other than Lane ESD or Lane County public schools will be directed to the media services manager;
3. Each use of the courier will be considered individually. No “standing” permission is granted to any entity;
4. All entities using the courier service will follow the communication patterns established by each of the component school districts;
5. Any entity using the courier service must prepare the material for delivery and place it at the collection points designated by the media services manager;
6. Schools may use the courier service as a freight system under the conditions listed below. Any such delivery must result in a cost savings or special convenience for the component school districts.
 - a. The ESD must receive a request for such service from the component district with whom the vendor is transacting business.
 - b. The weight and/or size of the merchandise packages must be such that they can be conveniently handled by the courier drivers.
 - c. Items may be held at the ESD office until, in the opinion of the staff, there is space available in the courier vehicles.
 - d. The ESD employees will not sign for merchandise or accept any responsibility for safe delivery.
7. It is understood the courier service is for the convenience of the school districts of Lane County only. The request for courier service shall not conflict with services normally provided the districts by the U.S. Postal Service.

Lane Education Service District

Code: EGACA
Adopted: 9/23/03
Orig. Code(s): EGACA

Cell Phones ~~Cellular Telephones~~

The Board recognizes that the use of ~~cell phones~~ ~~cellular telephones~~ may be appropriate to provide for the effective and efficient operation of the ~~ESD~~ ~~district~~ and to help ensure safety and security of ~~ESD~~ ~~district~~ property, staff and others while on ~~ESD~~ ~~district~~ property or engaged in ~~ESD~~ ~~district~~-sponsored activities. To this end, the Board authorizes the purchase and employee use of ~~cell phones~~ ~~cellular telephones~~, as deemed appropriate by the superintendent.

~~ESD~~ ~~district~~-owned ~~cell phones~~ ~~cellular telephones~~ shall be used for authorized ~~ESD~~ ~~district~~ business purposes, consistent with the ~~ESD~~ ~~district~~'s mission and goals. Personal use of such equipment is prohibited except in emergency situations. Employees do not have any expectations of privacy with ~~ESD~~ ~~district~~-owned cell phones or any information stored on them; the phone may be confiscated and searched at any time. Employee use of an ~~ESD~~ ~~district~~-owned cell phone shall not violate Oregon's ethics laws. Any expenses incurred for such personal use shall be reimbursed to the ~~district~~ ~~ESD~~.

If an employee's cell phone purchase is reimbursed by the ~~ESD~~, or the employee is provided a stipend to purchase a cell phone, all phone records, text messages, emails to and from the cell phone, and other communications made with the cell phone may be public records.

Employees shall not use cell phones, whether ~~ESD~~-owned or personally-owned, for non-~~ESD~~-related business while attending to and/or performing their job responsibilities.

Use of ~~cell phones~~ ~~cellular telephones~~ in violation of Board policies, administrative ~~regulations~~ ~~rules~~ and/or state and federal laws will result in discipline up to and including dismissal and/or referral to ~~Oregon~~ ~~Government~~ ~~Ethics~~ ~~Standards~~ ~~and~~ ~~Practices~~ Commission and law enforcement officials, as appropriate.

The superintendent is directed to develop administrative ~~regulations~~ ~~rules~~ for the implementation of this policy, including a uniform and controlled system for identifying employee ~~cell phone~~ ~~cellular telephone~~ needs, monitoring use and reimbursement. Provisions may also be included for staff use of privately-owned ~~cell phones~~ ~~cellular telephones~~ for authorized ~~ESD~~ ~~district~~ business.

END OF POLICY

Legal Reference(s):

[ORS 244.010](#)

[ORS 244.020\(15\)](#)

[ORS 244.040\(1\)\(a\)](#)

[ORS 244.120](#)

[ORS 334.125\(7\)](#)

Davidson v. Or. Gov't Ethics Comm'n, 300 Or. 415 (1985)

OR. GOV'T STANDARDS AND PRACTICES COMM'N, ADVISORY OPINIONS 02S-020 (Aug. 2, 2002), 02A-1008 (July 12, 2002), 01A-1004 (June 1, 2001) and 98A-1003 (July 9, 1998).

Lane Education Service District

Code: EGACA-AR
Adopted: 9/23/03
Revised/Reviewed:
Orig. Code(s): EGACA-AR

~~Cell Phones~~Cellular Telephones

~~District~~ESD-owned ~~cell phones~~cellular telephones may be purchased and authorized for staff use in accordance with the following:

~~Cell Phone~~Cellular Telephone Authorization

Cell phones~~Cellular telephones~~ may be assigned or made available on a temporary basis by the ~~service area director~~ [superintendent] [business manager] [or designee] when it is determined that:

1. The assignment of a ~~cell phone~~cellular telephone to the employee is a prudent use of ~~ESD~~district resources;
2. The employee's job responsibilities require the ability to communicate frequently ~~and access to a district or public telephone is not readily available~~;
3. The employee's job responsibilities involve situations where immediate communication is necessary to ensure the security of ~~ESD~~district property or safety of students, staff or others while on ~~ESD~~district property or engaged in ~~ESD~~district-sponsored activities.

~~Cell Phone~~Cellular Telephone Use

1. ~~Cell phones~~Cellular telephones are provided specifically to carry out official ~~ESD~~district business ~~when other means of communications are not readily available~~.
2. ~~Cellular telephones are not to be used when a less costly alternative is readily available, unless as otherwise necessary for safety or emergency circumstances or where the phone assigned is in lieu of a desk phone.~~
- 3.2. Personal use of ~~ESD cell phones~~cellular telephones is limited to making or receiving calls for family emergency purposes, ~~including contacting a family member or child-care provider to advise that the employee is going to be late arriving home or picking up children for a reason directly related to his/her official district duties, i.e., a meeting which runs later than expected or a last minute schedule change. Where the cellular phone is assigned in lieu of a desk phone, personal use is restricted to lunch, breaks or other such times when the employee is not on duty.~~
4. ~~Cellular telephones are to be used with discretion for conversations involving district information of a confidential nature.~~
- 5.3. ~~Cellular telephones are~~ESD cell phones shall not to be loaned to others ~~not employed by the agency~~.

- 6.4. Employees issued a ~~cell phone~~ ~~cellular telephone~~ are responsible for its safekeeping at all times. Defective, lost or stolen ~~cell phones~~ ~~cellular telephones~~ are to be reported immediately to the ~~[business manager]~~ ~~[immediate supervisor]~~ who will in turn notify the service provider.
- 7.5. ~~Cell phones~~ ~~Cellular telephones~~ issued for employee use are to be returned to the ~~[business manager]~~ ~~[service area]~~ at the conclusion of the fiscal year, activity or as otherwise specified.

Privately-Owned ~~Cell Phones~~ ~~Cellular Telephones~~

1. ~~ESD~~ ~~District~~ employees may be reimbursed ~~[, or receive a stipend.]~~ for use of privately-owned ~~cell phones~~ ~~cellular telephones~~ to conduct ~~ESD~~ ~~District~~ business in accordance with Board policy and this regulation, with prior approval of the ~~[service area director]~~ ~~[superintendent]~~ ~~[or]~~ ~~[business manager]~~ ~~[or designee]~~.
2. Personal use of privately-owned ~~cell phones~~ ~~cellular telephones~~ by employees authorized to use such equipment for ~~ESD~~ ~~District~~ business is restricted to lunch, breaks or other such times when the employee is not on duty.

Reimbursement

1. Requests for reimbursement for authorized use of employee-owned ~~cell phones~~ ~~cellular telephones~~ are to be submitted on ~~ESD~~ ~~District~~-provided forms, available through the office and accompanied by a copy of the billing statement with the ~~ESD~~ ~~District~~ business-related calls highlighted. A notation for each highlighted entry, indicating the nature of the call, is required.
2. All requests for reimbursement, including the highlighted billing statement, must be submitted within {30} days of the end of the time period for which reimbursement is requested, or quarterly with advance approval from the director. Requests submitted after the reimbursement deadline has passed ~~[will]~~ ~~[may]~~ be denied.
3. District reimbursement for authorized use of employee-owned ~~cell phones~~ ~~cellular telephones~~ will be made ~~[within 30 days]~~ in conformance with ~~ESD~~ ~~District~~ payment procedures.

Lane Education Service District

Code: EHA
Adopted: 9/28/04
Orig. Code(s): EHA



Health Insurance Portability and Accountability Act (Version 1)

(For ESDs that bill for Medicaid or use a contracted service to bill for Medicaid)

(There are three sample versions of this policy (see additional version 2 and 3); please pay special attention to the highlighted subtitle to determine which is appropriate for the ESD. This is the ESD's current policy. Based on the questionnaire, the ESD is self-insured and has a 125 plan but does not bill for Medicaid. This policy is specific to just billing for Medicaid. See the alternate version that follows.)

The Board has determined that it meets the definition of a hybrid of covered entities¹ under the Health Insurance Portability and Accountability Act (HIPAA). The ESD offers health-care provider programs and services. The ESD contracts with another entity to provide electronic billing for the reimbursement of services under Oregon Medicaid programs, and is subject to HIPAA.

As a covered entity, the ESD will ensure that electronic billing contractors meet the national electronic transaction standards and applicable requirements of federal law. In all electronic transactions involving student education records information, the ESD will adhere to the confidentiality requirements of the Family Educational Rights and Privacy Act (FERPA).

The superintendent will ensure that training is provided to appropriate staff with access to, and responsibility for, electronic transactions of student education records information as required by HIPAA. Notice will be provided to students and parents of their rights pertaining to the disclosure of personally identifiable information, complaint procedures and the ESD official to contact in the event of questions, as provided in established student education records related Board policies and administrative regulations.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

Health Insurance Portability and Accountability Act of 1996, 42 U.S.C. §§ 13 to -d-8 (2012); 45 C.F.R. Parts 160, 164 (2016).

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2012); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2016).

¹ A “covered entity” is an entity subject to HIPAA. These include those entities defined under the Act as a health plan, health care clearinghouse, health care provider or a hybrid entity. A hybrid of covered entities is a single legal entity that is a covered entity and whose covered functions are not its primary function. Self-insured health plans and Internal Revenue Service Section 125 plans with 50 or more participants operated or maintained by public schools entities are covered health plans for HIPAA privacy rule purposes. Similarly, any provider of services, a provider of medical or health services as defined in section 1861 of the Act, (42 U.S.C. § 1395X(s)), and any person or organization who furnishes, bills or is paid for health care in the normal course as defined by 45 C.F.R. § 160.103 is also subject to HIPAA requirements as a health-care provider. ESD’s should review their programs and services with their legal counsel in determining HIPAA applicability.

Lane Education Service District

Code: EHA
Adopted:

Health Insurance Portability and Accountability Act (Version 2)

(For ESDs that self-insure a health plan and/or self-administer an Internal Revenue Service Section 125 plan)

The Board has determined that it meets the definition of a hybrid of covered entities¹ under the Health Insurance Portability and Accountability Act (HIPAA). As the ESD [self-insures a health plan] [and] [self-administers an Internal Revenue Service Section 125 plan] it meets the health plan definition under HIPAA. As a covered entity, the ESD will meet the requirements of federal law.

Accordingly, the ESD will safeguard the protected health information² of employees from use or disclosure that may violate standards and implementation specifications to the extent required by law. The electronic exchange of financial and administrative transactions related to an employee's protected health information will meet the requirements of HIPAA, including national standards for electronic transactions designed to ensure the security of health information created or received by the ESD.

The superintendent will designate an individual responsible for responding to HIPAA inquiries, complaints and for providing adequate notice of employee rights and ESD duties under the health plan provisions of the Act. Notice will include the privacy provisions of the law, and uses of employee protected health information and disclosures that may be made by the ESD.

Training will be provided to all current staff and new employees determined by the ESD to have access to the protected health information of employees. Training will be provided within a reasonable period of time after the individual's hiring, and to those employees when their duties may be impacted by a change in the ESD's policy and/or procedures.

Employees who believe their privacy rights have been violated may file a complaint in accordance with established ESD procedures. Complaints may also be filed directly with the U.S. Secretary of Health and Human Services. There shall be no retaliation by the ESD against any person who files a complaint or otherwise participates in an investigation or inquiry into an alleged violation of an individual's protected privacy rights. All complaints received will be promptly investigated and documented, including their final

disposition.

¹ A "covered entity" is an entity subject to HIPAA. These include those entities defined under the Act as a health plan, health-care clearinghouse, health-care provider or a hybrid entity. A hybrid of covered entities is a single legal entity that is a covered entity and whose covered functions are not its primary function. Self-insured health plans and Internal Revenue Service Section 125 plans with 50 or more participants operated or maintained by public schools entities are covered health plans for HIPAA privacy rule purposes. Similarly, any provider of services, a provider of medical or health services as defined in section 1861 of the Act, (42 U.S.C. § 1395X(s)), and any person or organization who furnishes, bills or is paid for health care in the normal course as defined by 45 C.F.R. § 160.103 is also subject to HIPAA requirements as a health-care provider. ESD's should review their programs and services with their legal counsel in determining HIPAA applicability.

² "Protected health information" means individually identifiable health information that is: (1) transmitted by electronic media; (2) maintained in electronic media; (3) transmitted or maintained in any other form or medium. Protected health information excludes individually identifiable health information in education records covered by the Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g, and employment records held by a covered entity in its role as employer.

The superintendent will ensure that satisfactory assurance has been obtained from any business associate³ performing HIPAA-covered activities or functions on behalf of the ESD that the protected health information it receives from the ESD will be protected. Such assurance will be in the form of a written agreement, or may be included as a part of the ESD’s contract with the business associate.

Employees in violation of this policy or procedures established to safeguard the protected health information of employees will be subject to discipline up to and including dismissal.

The superintendent is directed to ensure an assessment of ESD operations is conducted to determine the extent of the ESD’s responsibilities as a covered entity under HIPAA and to develop internal controls and procedures necessary to implement this policy and meet the requirements of law. The procedures shall include provisions for record keeping, documentation of the ESD’s compliance efforts and appropriate administrative, technical and physical safeguards to protect employee protected health information and to ensure that any request is limited to information reasonably necessary to accomplish the purpose for which the request is made.

In the event of a change in the law that may impact this policy or established ESD procedures, the superintendent shall ensure appropriate revisions are recommended for Board approval, necessary changes are implemented and notification is made to staff and others, as appropriate.

END OF POLICY

Legal Reference(s):

[ORS 334.125\(7\)](#)

Health Insurance Portability and Accountability Act of 1996, 42 U.S.C. §§ 1320d to -d-8 (2012); 45 C.F.R. Parts 160, 164 (2016).

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2012); Family Educational Rights and Privacy, 34

C.F.R. Part 99 (2016).

³ A “business associate” means a person who on behalf of such covered entity or of an organized health-care arrangement in which the covered entity participates, but other than in the capacity of a member of the workforce of such covered entity or arrangement, performs or assists in the performance of: (1) a function or activity involving the use or disclosure of individually identifiable health information, including claims processing or administration, data analysis, processing or administration, utilization review, quality assurance, billing, benefit management, practice management and repricing; or (2) any other function or activity regulated by HIPAA.

Lane Education Service District

Code: EHB
Adopted: 12/05/23
Orig. Code(s): EHB

Cybersecurity

The purpose of information security is to protect the confidentiality, integrity and availability of ESD data as well as any information systems that store, process, or transmit ESD data, and protect the information resources of the ESD from unauthorized access or damage.

The underlying principles followed to achieve that objective are:

1. **Information Confidentiality:** The ability to access or modify information is provided only to authorized users for authorized purposes;
2. **Information Integrity:** The information used in the pursuit of the ESD objectives can be trusted to correctly reflect the reality it represents; and
3. **Information Availability:** The information resources of the ESD, including the network, the hardware, the software, the facilities, the infrastructure, and any other such resources, are available to support the objectives for which they are designated.

The requirement to safeguard information resources must be balanced with the need to support the pursuit of legitimate ESD objectives. The value of information as a resource increases through its appropriate use; its value diminishes through misuse, misinterpretation, or unnecessary restrictions to its access.

This policy and accompanying administrative regulation applies to all staff and third-party agents of the ESD as well as any other ESD affiliate, including students, who are authorized to access ESD data and to all computer and communication devices and systems that store, process, or transmit ESD data.

END OF POLICY

Legal Reference(s):

[ORS Chapter 192](#)
[ORS 334.125](#)

[ORS 336.184](#)
[ORS 646A.600 - 646A.626](#)

Children’s Internet Protection Act, 47 U.S.C. §§ 254(h) and (l); 47 C.F.R. § 54.520.
Children’s Online Privacy Protection Act of 1998, 15 U.S.C. §§ 6501 to 6505; 16 C.F.R. § 312.
Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g; 34 C.F.R. § 99.
Health Insurance Portability and Accountability Act of 1996, 42 U.S.C. § 1320d; 45 C.F.R. §§ 160, 164.
Protection of Pupil Rights, 20 U.S.C. § 1232h; Student Rights in Research, Experimental Programs and Testing, 34 C.F.R. § 98.

Lane Education Service District

Code: EHB-AR
Revised/Reviewed: 11/07/23
Orig. Code(s): EHB-AR

Cybersecurity

Throughout its lifecycle, an information system that stores, processes or transmits ESD data shall be protected in a manner that is considered reasonable and appropriate, as defined in documentation approved and maintained by the Technology Services Department, given the level of sensitivity, value and criticality that the ESD data has to the ESD.

Individuals who are authorized to access ESD data shall adhere to the appropriate Roles and Responsibilities, as defined in this administrative regulation.

Roles and Responsibilities

“Designated Information Security Officer (ISO)” means an employee designated by the superintendent to oversee the information security program. The ISO will be a senior-level employee in the ESD. The responsibilities of the ISO include the following:

1. Developing and implementing a ESD-wide information security program;
2. Documenting and disseminating information security policies and procedures;
3. Coordinating the development and implementation of required information security training and awareness program for staff and administrators;
4. Coordinating a response to actual or suspected breaches in the confidentiality, integrity or availability of ESD data and following statutory requirements;
5. Implementing and overseeing secure authentication processes and protocols;
6. Implementing and conducting IT security audits.

“Data owner” means a management-level employee of the ESD who oversees the lifecycle of one or more sets of ESD data. Responsibilities of a data owner include the following:

1. Assigning an appropriate classification to ESD data;
2. Determining the appropriate criteria for obtaining access to ESD data;
3. Ensuring that data custodians implement reasonable and appropriate security controls to protect the confidentiality, integrity and availability of ESD data;
4. Understanding and approving how ESD data is stored, processed, and transmitted by the ESD and by third-party agents of the ESD; and

5. Understanding how ESD data is governed by ESD policies, state and federal regulations, contracts and other legal binding agreements.

“Data custodian” means an employee of the Technology Services Department who has administrative and/or operational responsibility over ESD data. In many cases, there will be multiple data custodians. A data custodian is responsible for the following:

1. Understanding and reporting on how ESD data is stored, processed and transmitted by the ESD and by third-party agents of the ESD;
2. Implementing appropriate physical and technical safeguards to protect the confidentiality, integrity and availability of ESD data;
3. Documenting and disseminating administrative and operational procedures to ensure consistent storage, processing and transmission of ESD data;
4. Provisioning and deprovisioning access to ESD data as authorized by the data owner;
5. Understanding and reporting on security risks and how they impact the confidentiality, integrity and availability of ESD data;
6. Back up data daily; and
7. Force email and domain passwords to expire at least annually.

“User,” for the purpose of information security, means any employee, contractor or third-party agent of the ESD who is authorized to access ESD Information Systems and/or ESD data. A user is responsible for the following:

1. Adhering to policies, guidelines and procedures pertaining to the protection of ESD data;
2. Reporting actual or suspected vulnerabilities in the confidentiality, integrity or availability of ESD data to a manager or the Technology Services Department; and
3. Reporting actual or suspected breaches in the confidentiality, integrity or availability of ESD data to the Technology Services Department.

Classification of Information

Data classification, in the context of information security, is the classification of data based on its level of sensitivity and the impact to the ESD should that data be disclosed, altered or destroyed without authorization. The classification of data helps determine what baseline security controls are appropriate for safeguarding that data. All ESD data should be classified into one of three sensitivity levels or classifications: confidential, sensitive and public. In some cases, data could fall into multiple categories, i.e., salaries.

Data should be classified as confidential when the unauthorized disclosure, alteration, or destruction of that data could cause a significant level of risk to the ESD or its affiliates. Examples of confidential data include data protected by state or federal privacy regulations and data protected by confidentiality

agreements. The highest level of security controls should be applied to confidential data. Examples: student data, evaluation and disciplinary records.¹

Data should be classified as sensitive when the unauthorized disclosure, alteration or destruction of that data could result in a moderate level of risk to the ESD or its affiliates. By default, all ESD data that is not explicitly classified as confidential or public data should be treated as sensitive data. A reasonable level of security controls should be applied to private data. Examples: salaries and staff personal contact information.

Data classified as sensitive may be disclosable as public record under Oregon Revised Statute (ORS) Chapter 192. However, the sensitivity level of the data can warrant the assigned data classification and associated safeguard security controls.

Data should be classified as public when the unauthorized disclosure, alteration or destruction of that data would result in little or no risk to the ESD and its affiliates. Examples of public data include information intended for broad use within the ESD community at large or for public use. While little or no controls are required to protect the confidentiality of public data, some level of control is required to prevent unauthorized modification or destruction of public data. Examples: board minutes and policies.

Online Services and Applications

ESD employees are encouraged to research online services or applications to support the pursuit of ESD objectives. However, ESD employees are prohibited from installing or using applications, programs or other software, or online systems/websites that store, collect or share confidential or sensitive data, until the ISO approves the vendor and software or service. Before approving the use or purchase of any such software or online service, the ISO, or designee, shall verify that it meets the requirements of all applicable laws, regulations and board policies, and that it appropriately protects ESD data. This prior approval is required whether or not the software or online service is obtained or used without charge.

Implementation

The Technology Services Department is directed to develop operating policies, standards, baselines, guidelines and procedures for the implementation of this administrative regulations to include, but not limited to, addressing data encryption, logical access control, physical access control, vulnerability management, risk management and security logging and monitoring.

Violations of Policy and Misuse of Information

Violations of this administrative regulation include, but are not limited to: accessing information to which the individual has no legitimate right; enabling unauthorized individuals to access information; disclosing information in a way that violates applicable policy, procedure or other relevant regulations or laws; inappropriately modifying or destroying information; inadequately protecting information; or ignoring the explicit requirements of data owners for the proper management, use and protection of information resources.

¹ These examples are for IT purposes and may not be consistent with record request and disclosure requirements.

Violations may result in disciplinary action in accordance with ESD policies, procedures and/or applicable laws. Sanctions may include one or more of the following:

1. Suspension or termination of access;
2. Disciplinary action up to and including dismissal; and
3. Civil or criminal penalties.

Employees are to report suspected violations of this administrative regulation to the ISO or to the appropriate data owner. Reports of violations are considered sensitive information until otherwise designated.

Lane Education Service District

Code: EI
Adopted: 1/22/02
Orig. Code(s): EI

Risk and Insurance Management

(See policy EIA)

Lane ESD will maintain a risk and insurance management program for the protection of life, health, property and financial resources.

“Risk and insurance management” is defined as the art and science of minimizing the adverse effects of financial loss to the ESD, public or ESD employees. It does not include employee benefits such as accident or health insurance.

It shall be the objective of the risk and insurance management program to:

1. Identify and evaluate the ESD’s exposure to loss;
2. Reduce or eliminate the risk;
3. Identify risk areas to be assumed by the ESD through the normal operating expenses (self-insurance);
4. Transfer the risk to insurance companies within the financial resources of the ESD;
5. Meet all applicable laws or statutes for ESD coverage.

END OF POLICY

Legal Reference(s):

[ORS 30.260 - 30.265](#)
[ORS 278.005 - 278.215](#)

[ORS 334.125 \(7\)](#)

[OAR 581-024-0240](#)

Lane Education Service District

Code: EIA
Adopted: 3/29/94
Revised/Readopted: 1/22/02; 3/21/06
Orig. Code(s): EIA

Insurance Programs

ESD District insurance coverage shall be written by a company that meets industry standards with a rating of not less than Best's Key Rating of Excellent (A, A-) or the equivalent. The [director of business services] will select a company with a financial size category adequate to ensure surplus resources to protect the ESD's district's assets.

Insurance may also be written by any fully insured, partially insured or self-insured pool that is able to demonstrate satisfactory financial stability as determined by Oregon law.

Blanket building and equipment insurance will cover replacement costs with an agreed amount endorsement or as per occurrence limit and with a deductible determined by the [business manager] to provide the lowest possible premium costs consistent with adequate protection from unanticipated expenditures.

General and personal liability insurance will cover ESD District Board members and employees only while acting in their official capacity.

All employees will be covered by a blanket dishonesty bond. Tort liability endorsements may be carried or faithful performance bond.

The ESD District will provide liability coverage for all district-owned or leased vehicles.

The ESD District will not carry student accident insurance other than liability insurance.

The ESD District will not be liable for theft and damage of personal property of students that is not a requirement for attendance or participation in ESD programs. Additionally, the ESD District will not be liable for theft and damage of personal property of staff.

END OF POLICY

Legal Reference(s):

[ORS 30.260 to -30.300](#)
[ORS 278.005 to -278.215](#)

[ORS 334.125\(7\)](#)

[OAR 581-024-0240](#)



SUPPORTING OUR YOUTH THROUGH COLLABORATION

August 6, 2025 | CH2M HILL OSU Alumni Center, Corvallis, OR

KEYNOTE SPEAKER



Guy Stephens
Founder, Alliance Against
Seclusion & Restraint

Behavior is Biology
The Need for Trauma-Informed,
Neuroscience-Aligned,
Relationship-Driven, and
Collaborative Approaches

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Together, we are transforming systems that support young people with both a mental health diagnosis and an intellectual or developmental disability.